



501 PR345: Strategic Sourcing

Instructor Led Training



Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website (www.cardinalproject.virginia.gov) under Training.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Glossary of frequently used terms

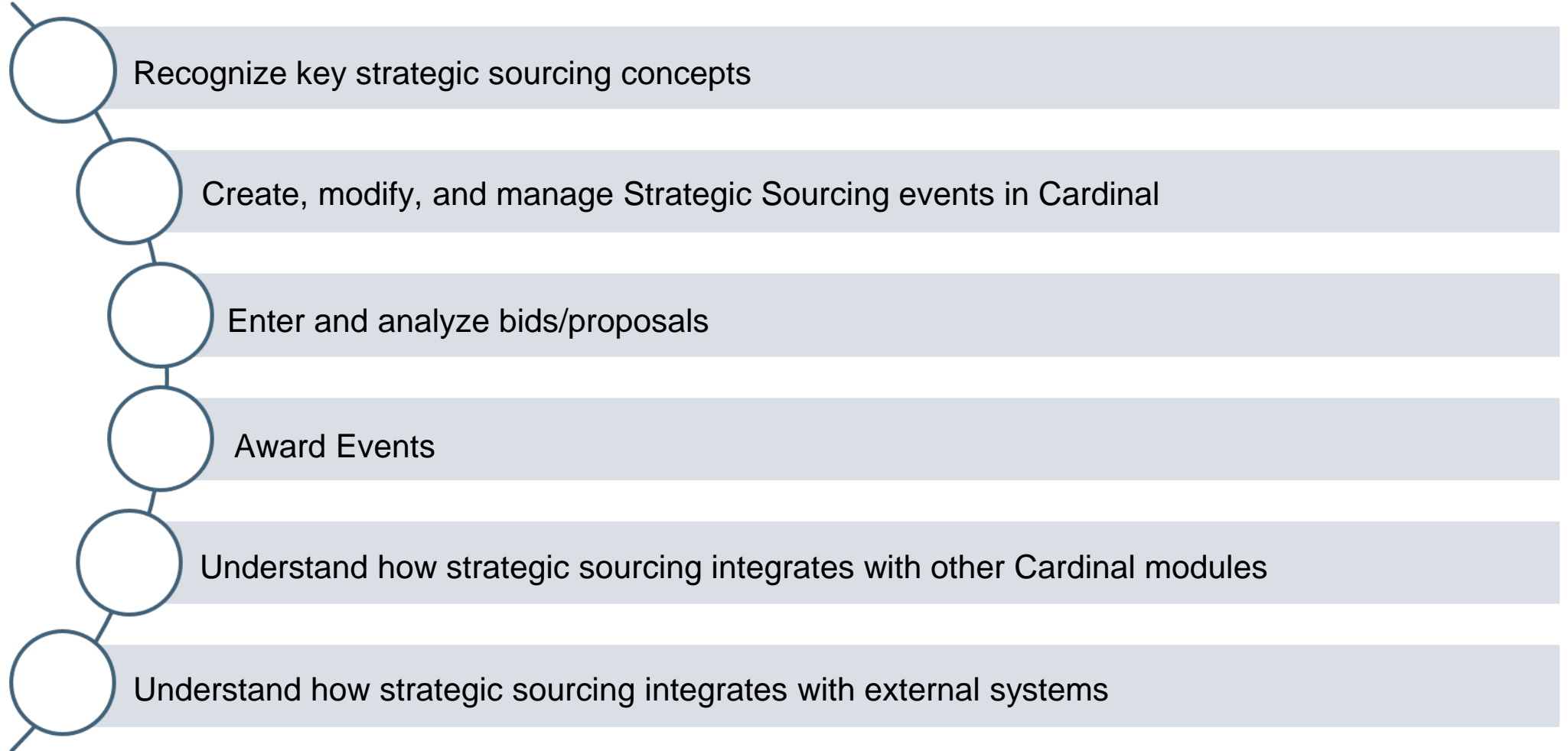
The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



Course Objectives

After completing this course, you will be able to:





Agenda

1

Understand Strategic Sourcing

2

Create Event

3

Maintain Events

4

Analyze Bids/Proposals and Awarding Events

5

Strategic Sourcing Hands-on Practice



Lesson 1: Introduction

1

Understanding Strategic Sourcing

This lesson covers the following topics:

- Procurement Overview
- Strategic Sourcing Key Concepts
- Procurement Process Overview
- Strategic Sourcing Overview



Procurement Overview

The Procurement functional area of Cardinal includes four modules:

Purchasing

The Purchasing module includes the buying of goods and services (Procurement) by creating and processing requisitions, purchase orders (PO), receipts, Procurement Card (PCard), and Integrated Supply Services Program (ISSP) transactions.

eProcurement

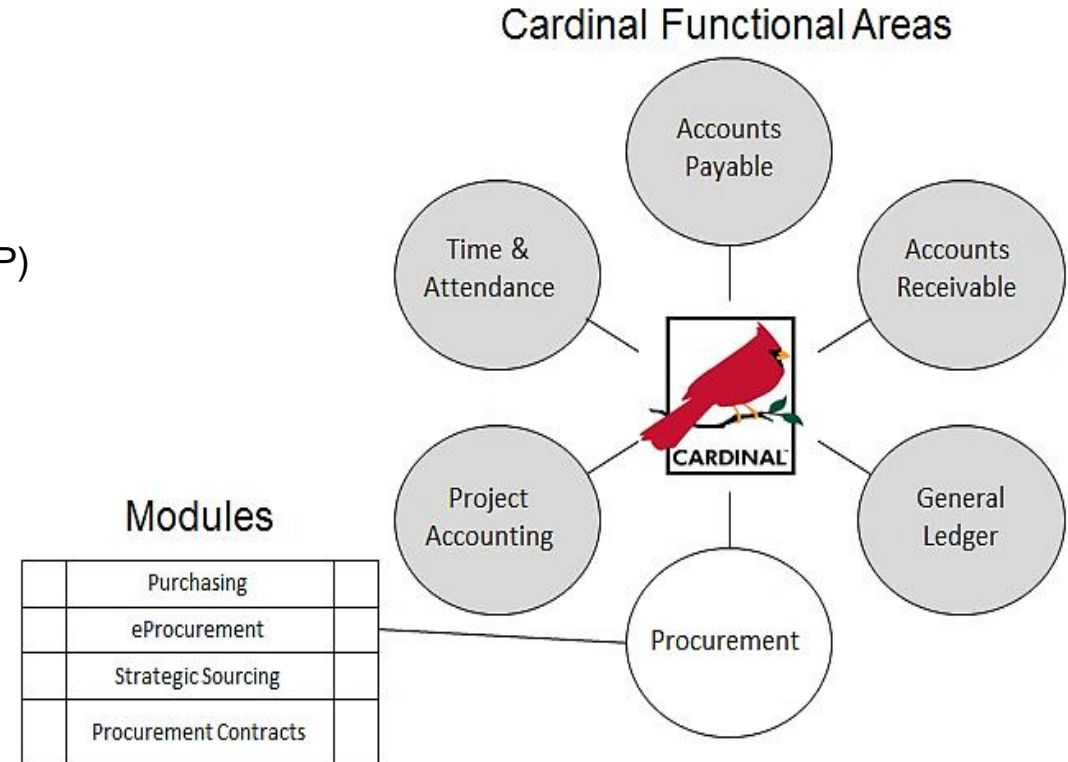
Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

Strategic Sourcing

The Strategic Sourcing module allows users to create and award bids/proposals to purchase orders or contracts.

Procurement Contracts

The Procurement Contracts module builds, manages, and archives all Cardinal contract related information.





Strategic Sourcing Key Concepts

Key concepts include:

- A Strategic Sourcing event involves the solicitation of quotes, bids/proposals, or offers to establish contracts and/or purchase orders (POs).
- Cardinal provides the Strategic Sourcing (SS) Buyer with a means to create, manage, and award Strategic Sourcing Events.
- The most common event is the Invitation for Bid (IFB) which is primarily awarded to the lowest responsive and responsible bidder meeting the required specifications.
- Similar functionality is provided to create, manage, and award the Two-Step (IFB) and Request for Proposal (RFP) events. In comparison to the lowest price, these event types are awarded based on the ranking of the Bidder/Offerors' responses and subsequent negotiations, to achieve the best value.
- RFPs are commonly known as competitive negotiations. These events are created with criteria that are weighted (ranked) by level of importance and scored based on the Offerors' submitted proposals. The lowest price is only one of multiple elements used in determining who will receive the award.



- Add/Update Requisitions
- Create Strategic Sourcing Events
- Add/Update Contracts
- Add/Update Purchase Orders
- Add/Update Receipts
- Procurement Card Processing
- Integrated Supply Services Program (ISSP) Processing





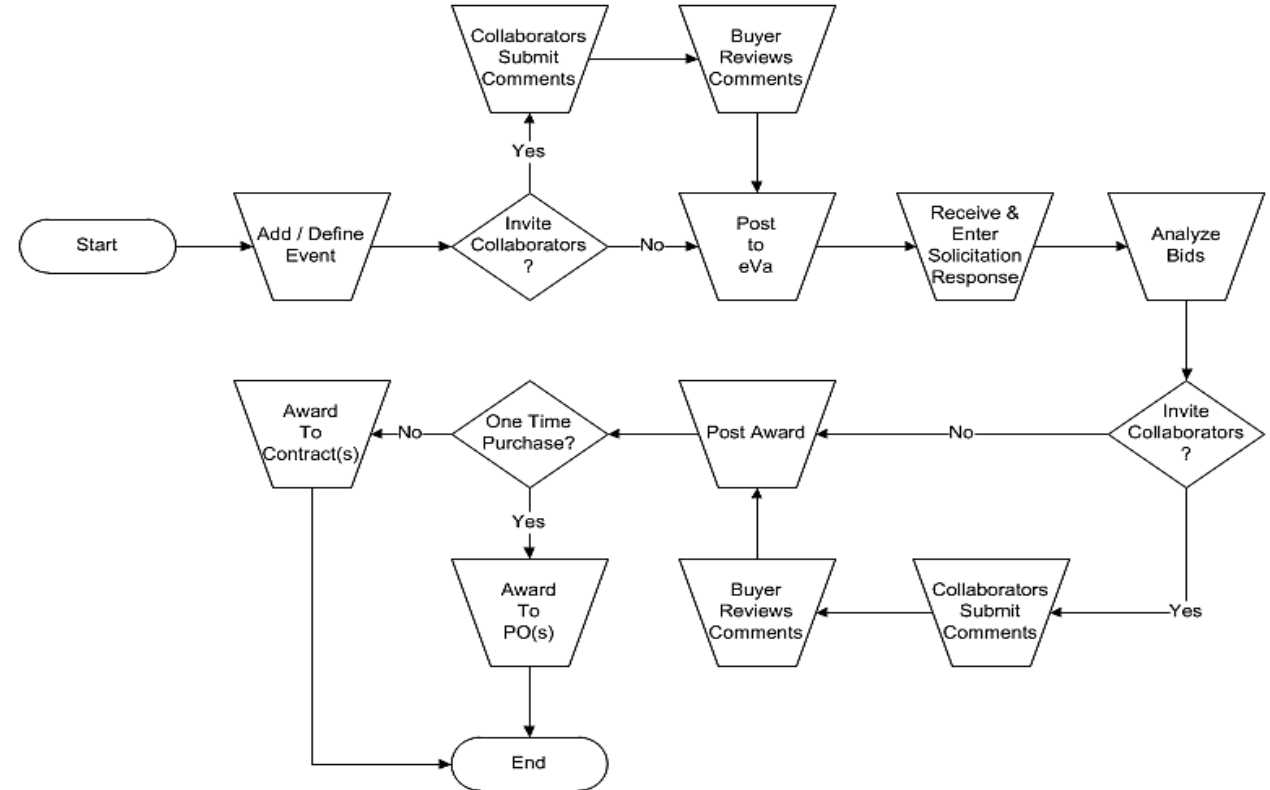


Strategic Sourcing Overview

Strategic Sourcing allows users to create and award bids/proposals to purchase orders or contracts. Sourcing events are manually sent to eVA for posting online in order to obtain bids on items and/or services.

Strategic Sourcing involves several key steps:

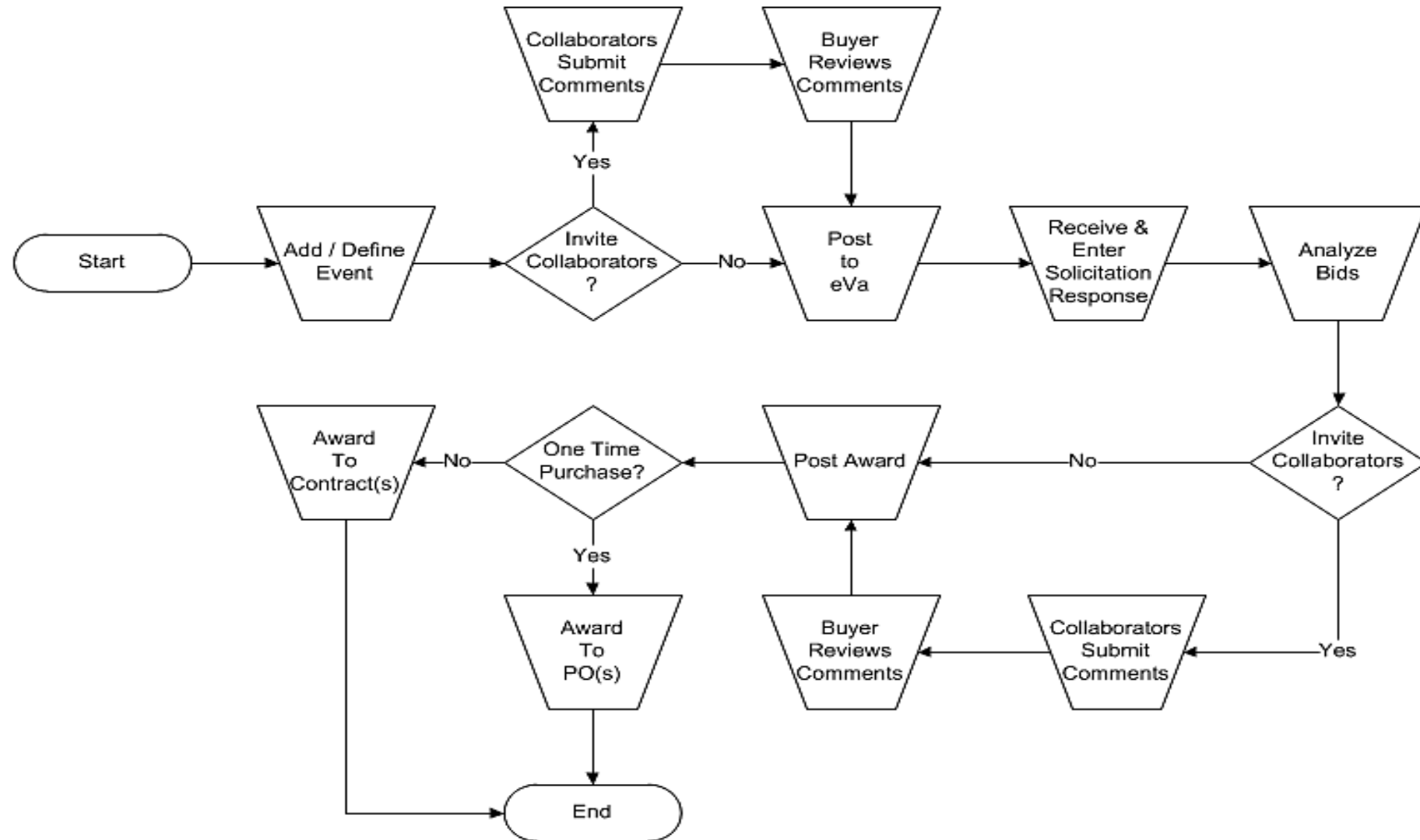
- Add/Define Event
- Event Collaboration*
- Receive and Enter Solicitation Response(s)
- Analyze Bid Response(s)
- Response Collaboration*
- Post Award
- Award to Contract(s) or Purchase Order(s)



*For more detailed information about **Collaboration**, see the job aid entitled **501 PR345: Strategic Sourcing Collaboration** located on the Cardinal website in **Job Aids** under **Training**.



Strategic Sourcing Overview (continued)





Lesson 1: Summary

1

Understanding Strategic Sourcing

In this course, you learned:

- The procurement functional area is composed of several modules: Purchasing, eProcurement, Strategic Sourcing, Procurement Contracts, and Receipts.
- A strategic sourcing event is the process of soliciting quotes and bids/proposals to establish contracts and/or purchase orders.



Lesson 2: Introduction

2

Create Event

This lesson covers the following topics:

- Create Event (Ad Hoc or Copy)
- Define Event Basics (By Line, Group, or Grand Total)
- Configure Line Items
- Invite Collaborators
- Post an Event for Bidding



Create Events

To add an event, use the **Create Events** page. Navigate to this page using the following path:

Main Menu > Sourcing > Create Events > Event Details

Select the **Add a New Value** tab. Key fields that need to be defined include:

- **Business Unit:** Confirm the Business Unit
- **Event ID:** Uniquely identifies the event and is automatically assigned (do not modify)
- **Event Format:** Buy
- **Event Type:** RFx

Click **Add** to go to the **Event Summary** page to create the event.

Most events have an **Event Format** of **Buy** and **Event Type** of **RFx** or **RFI**.

Buy can be an Invitation For Bid (IFB) or a Request For Proposal (RFP). **RFx** can be an Invitation For Bid (IFB), Request For Proposal (RFP), or Two-Step Bid. **RFI** is a Request for Information.



Create Events (continued)

The **Event Summary** page is updated with the values you previously entered on the **Create Events** page

When creating an event, provide an overall description of the event at the header level, with item specific details at the line level. It is possible to copy a previous event, purchase order, requisition, contract, or RFI to create a new event, and save events to use as templates.

On the **Event Summary** page enter the:

- **Solicitation Type**
- **Event Name**
- **Description**
- **Preview Date:** Collaboration end date/time (this date must be prior to the Start Date)
- **Start Date:** Bids can be entered
- **End Date:** Bids can no longer be entered

Business Unit 50100 Event ID NEXT Round 1 Version 1 Event Format Buy

Event Type RFx Change to Auction

Event Status Open

*Solicitation Type : IFB Sealed Contract

*Event Name

Description

Time Zone EDT

Preview Date 10/10/2019 Time 2:50PM

Start Date 10/24/2019 Time 2:50PM

End Date 11/03/2019 Time 2:50PM

Copy From Go

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

* Event Settings and Options
Event Comments and Attachments
Event Header Bid Factors

Payment Terms and Contact Info
Event Constraints

Step 2: Configure Line Items
Create line listings for this event.

* Line Items
Item Line Defaults

The **Preview By** drop-down box allows viewing the event either by line, lot (group), or total



Create Events (continued)

On the **Event Summary** page, the **Copy From** drop-down allows populating fields into the event.

Click on the **Arrow** icon next to the **Description** field to open a larger **Description** box/field. Use the Book Check icon to check spelling errors.

The screenshot shows the 'Create Events' application interface. The top navigation bar includes 'Favorites', 'Main Menu', 'Sourcing', 'Create Events', and 'Event Details'. The main form is titled 'Event Summary' and contains the following fields:

- Business Unit: 50100
- Event ID: NEXT
- Round: 1
- Version: 1
- Event Format: Buy
- Event Type: RFx
- Event Status: Open
- *Solicitation Type: (dropdown)
- *Event Name: (text field)
- Description: RFP Sample Description

A 'Copy From' dropdown menu is open, showing the following options:

- Contract
- Delimited File
- Item Master
- Purchase Order
- Request For Information
- Requisition
- Sourcing Event
- Sourcing Template
- Event Constraints

A larger 'Description' box is also visible, titled 'Sourcing Event Create Comp', containing the text 'RFP Sample Description'. Below the main form, there is a section for 'Event Collaborators' and a 'Step 5: Post Event' section with instructions and buttons for 'Save Event', 'Post', 'Save As Template', and 'Preview PDF'.



Create Events (continued)

The next section on the **Create an Event – Event Summary** page lists the five steps for creating an event.

Under **Step 1: Define Event Basics**, click on the **Event Settings and Options** hyperlink to set options for the event.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)
[Event Constraints](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event](#)
[Post Event](#)

[Save As Template](#)



Define Event Basics

The **Event Settings and Options** link provides for the following options to be set as needed:

- **Allow Bidder XML Downloads:** Do not select.
- **Bid Required on All Lines:** Do not select.
- **Multiple Bids Allowed:** Do not select.
- **Allow Edit of Posted Bids:** Defaults to checked. Posted bids cannot be changed unless this box is checked when the event is created.

[Create an Event](#)
[Event Settings and Options](#)

Business Unit 50100 Event ID 0000153863 Round 1 Version 1 Event Format Buy Event Type RFx

☒ Create PDF on Event Post
☐ Allow Bidder XML Downloads
☐ Bid Required On All Lines
☐ Multiple Bids Allowed
☒ Allow Edit of Posted Bids
☐ Do Not Use Best Bids on New Rounds
☐ Display Bid Factor Ideal Value

RoundVersion Display Display Round and Version
☒ Sealed Event
☐ Display Bid Factor Weightings
☐ Display Bid Factor Best/Worst

Factor Event Score Into Total Score
Header Weighting 100.00000
Line Factor Weighting
Start Price Do Not Display
☐ Bidders May Create Line Groups
☐ Allow Price Breaks with Groups

[▶ Minimum Response and Warning](#)
[▶ Associated Categories](#)

[Save Event Changes](#) GoTo [Go](#)
[< Return to Event Overview](#)



Define Event Basics (continued)

The **Event Settings and Options** link provides for the following options to be set as needed (continued):

- **Round\Version Display:** Defaults to **Display Round and Version** - Do not change.
- **Sealed Event:** Defaults to checked. Deselect, if applicable.
- **Display Bid Factor Weightings:** Buyers can add bid and weighting factors to help determine the award. Check if Request for Proposal (RFP) or Two-Step bid.

[Create an Event](#)
[Event Settings and Options](#)

Business Unit 50100 Event ID 0000153663 Round 1 Version 1 Event Format Buy Event Type RFx

☒ Create PDF on Event Post
☐ Allow Bidder XML Downloads
☐ Bid Required On All Lines
☐ Multiple Bids Allowed
☒ Allow Edit of Posted Bids
☐ Do Not Use Best Bids on New Rounds
☐ Display Bid Factor Ideal Value

Round\Version Display **Display Round and Version** ▼
☒ Sealed Event
☐ Display Bid Factor Weightings
☐ Display Bid Factor Best/Worst

Factor Event Score Into **Total Score** ▼ Start Price **Do Not Display** ▼
Header Weighting
Line Factor Weighting

☐ Bidders May Create Line Groups
☐ Allow Price Breaks with Groups

▶ **Minimum Response and Warning**
▶ **Associated Categories** ?

[Save Event Changes](#) GoTo ▼ [Go](#)

[< Return to Event Overview](#)



Define Event Basics (continued)

Additional fields on the **Events Settings and Options** page include:

- **Factor Event Score Intro** provides three options: **Line Score**, **Line and Total Score**, and **Total Score**.
- **Header or Line Factor Weighting**: Field availability is based on selection made for **Factor Event Score Intro** field.
- **Start Price**: Defaults to **Do Not Display**.

After updates are made, **Return to Event Overview** to return to the **Event Summary** page.

[Create an Event](#)
[Event Settings and Options](#)

Business Unit 50100 Event ID 0000153683 Round 1 Version 1 Event Format Buy Event Type RFx

☒ Create PDF on Event Post
☐ Allow Bidder XML Downloads
☐ Bid Required On All Lines

☐ Multiple Bids Allowed
☒ Allow Edit of Posted Bids
☐ Do Not Use Best Bids on New Rounds
☐ Display Bid Factor Ideal Value

Round\Version Display Display Round and Version

☒ Sealed Event
☐ Display Bid Factor Weightings

☐ Display Bid Factor Best/Worst

Factor Event Score Intro Total Score
Header Weighting
Line Factor Weighting

Start Price Do Not Display

☐ Bidders May Create Line Groups
☐ Allow Price Breaks with Groups

▶ **Minimum Response and Warning**

▶ **Associated Categories** ?

Save Event Changes

GoTo Go

[< Return to Event Overview](#)



Define Event Basics (continued)

Under **Step 1: Define Event Basics**, click the **Event Comments and Attachments** hyperlink.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)
[Event Constraints](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event](#)
[Post Event](#)

[Save As Template](#)



Define Event Basics (continued)

Comments and attachments may be added to the event using the **Event Header Comments and Attachments** page. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course.

The **Enter Comments** section permits adding notes about the event. This section may be used to enter specifications, as well as cut and paste information from other documents. The **Standard Comments** hyperlink permits choosing predefined comments to add to the event.

- Click the **+ / -** to add or delete **Comments**.
- Check **Send to Bidder** or **Include on Award** to have a specific comment included on the award.
- Add attachments to the event by clicking the **Add Attachment** button. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course.

- Click **OK**.

Event ID NEXT

Enter Comments ? View All First 1 of 1 Last

Comments:

☐ Send To Bidder ☐ Include On Award [Standard Comments](#)

[Add Attachment](#) OK Cancel Refresh



Define Event Basics (continued)

The system is preconfigured with terms and conditions (comments) specific to Request for Proposals Terms (**RFP**), Information Technology Terms (**ITT**), and Solicitation/IFBs Terms (**SOL**). To select a preloaded comment, choose the **Std Type** field based on the type of event, i.e. **RFP**, **ITT**, or **SOL**, being created. The **Comment ID** field is populated based on the **Std Type** selected. Select the **Comment ID** which contains the terms and conditions verbiage related to the type event being created. The **Comments** box will populate based on the **Comment ID** selected.

RFP Example:

Std Type = RFP

Comment IDs have been filtered so that only those related to terms and conditions for RFPs will appear.

Select a valid value of **AWSR**.

Click **OK**.

Header Standard Comments

Comment Text

*Action: Copy Comment

Std Type: RFP

Comment ID: AWSR

*Eff Date: 10/10/2019

Description:

Short Description:

Comments:

AWARD: Selection shall be made qualified and best suited among the evaluation factors included in the Request for Proposals. Negotiations shall be conducted after negotiations have been conducted. After negotiations have been conducted, the offeror which, in its award the contract to that offeror. Proposals or reject proposals at the discretion of the agency.

Look Up Comment ID

SetID: Standard Comment Type

STATE: RFP

Standard Comment ID begins with:

Description begins with:

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-8 of 8 Last

Standard Comment ID	Description
AWSR	AWRD TO OTHER THAN HIGHEST RANK
AWMR	AWARD-MULTIPLE OFFERORS RFP
AWPS	AWARD-PROFESSIONAL SERVICE-RFP
AWSR	AWARD-STANDARD FOR RFP
BACP	BID ACCEPTANCE PERIOD
BAFO	BEST AND FINAL OFFER (BAFO)
BVAW	BEST VALUE AWARD(S)
UBVA	UNSEALED BEST VALUE AWARD(S)

OK **Cancel** **Refresh**



Define Event Basics (continued)

From the **Event Summary** page, under **Step 1: Define Event Basics**, click the **Event Header Bid Factors** hyperlink.

FavoritesMain MenuSourcingCreate EventsEvent Details

Create an EventEvent Summary

Business Unit50100Event ID0000155603Round1Version1Event FormatBuy

Event TypeRFxChange to Auction

Event StatusOpen

*Solicitation Type :Request for Proposal

*Event NameTest

DescriptionRFP Sample Description

Time ZoneEST

Preview Date12/11/2019Time12:41PM

Start Date12/25/2019Time12:41PM

End Date01/04/2020Time12:41PM

Copy FromGo

Preview By:By Line

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* Event Settings and Options

Event Comments and Attachments

Event Header Bid Factors

Payment Terms and Contact Info

Event Constraints

Step 2: Configure Line Items

Create line listings for this event.

* Line Items

Item Line Defaults

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event

Post

Save As Template

Preview PDF



Define Event Basics (continued)

The **Event Header Bid Factors** hyperlink will take you to the **Event Bid Factors** page. This process is optional.

The bid factors selected here apply to the entire event and the resulting contract. Using the **Bid Factor** look-up, choose from predefined questions for the Bidder/Offeror. **Bid factors** come in the form of a **Yes/No** question (radio button) or as a text field and may be assigned a weight depending on the level of importance.

Event ID NEXT

Event Name Test

Bid Factor Weighting Total 0.00000

Remaining Bid Factor Weight 100.00000

Bid Factors ?

Seq Nbr 1

*Bid Factor

Question

Best 0.000000 Worst 0.000000

UOM

*Type

Weighting 0.00000

☐ Display Bid Factor?

☐ Bid Factor Response Required

☐ Ideal Response Required

☐ Select for deletion

Add Bid Factors by Group Select Bid Factors Delete Selected Records

Bid Factor Weighting Total 0.00000

Remaining Bid Factor Weight 100.00000

Save Event Changes

GoTo Go

< Return to Event Overview

Refresh Add Update/Display



Define Event Basics (continued)

After selecting **Bid Factors**, click the **Return to Event Overview** hyperlink.

Favorites ▾Main Menu ▾>Sourcing ▾>Create Events ▾>Event Details

Create an Event

Event Bid Factors

Event ID NEXT

Event Name Test

Bid Factor Weighting Total 0.00000

Remaining Bid Factor Weight 100.00000

Bid Factors ?

Seq Nbr 1

*Bid Factor

Question

Best 0.000000Worst 0.000000

☐ Select for deletion

*Type

Weighting 0.00000

☐ Display Bid Factor?
☐ Bid Factor Response Required
☐ Ideal Response Required

UOM

Add Bid Factors by Group

Select Bid Factors

Delete Selected Records

Bid Factor Weighting Total 0.00000

Remaining Bid Factor Weight 100.00000

GoTo Go

< Return to Event Overview

Refresh

AddUpdate/Display



Define Event Basics (continued)

After returning to the **Event Summary** page, under **Step 1: Define Event Basics**, click the **Payment Terms and Contact Info** hyperlink to open the **Event Contacts Details** page.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

Payment Terms and Contact Info
[Event Constraints](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event](#)
[Post](#)

[Save As Template](#)
[Preview PDF](#)



Define Event Basics (continued)

In the **Payment & Currency Information** section of the **Event Contact Details** page, **Bill Addr**s defaults, and in the **Event Contact** section the user **Contact Name**, **Email ID**, and **Phone** defaults. These fields can be modified.

Click the **Return to Event Overview** hyperlink to return to the **Event Summary** page and move on to **Step 2, Configure Line Items**.

Favorites ▾Main Menu ▾ > Sourcing ▾ > Create Events ▾ > Event Details

Modify an Event

Event Contact Details

Payment & Currency Information ?

*CurrencyUSD ?Exchange Rate

*Rate TypeCRRNT ?

Pay Method ▾

Rate Date12/11/2019 ?

Payment Terms ?

☐ Allow bids in other currencies

Bill AddrCNTRL OFF3 ?

☐ Tax Exempt

BuyerDEBBIE.BELL ?

Exempt ID

Event Contact ?

Contact NameBell, Debbie (VDOT)

Email IDxxxxdebbie.bell@vdot.virginia.gov

Phone804/524-6058

Save Event Changes

GoTo ▾Go

< Return to Event Overview

Return to Search

Refresh

Add

Update/Display



Configure Line Items

From the **Event Summary** page, under **Step 2: Configure Line items**, click the **Line Items** hyperlink.

Favorites ▾Main Menu ▾ > Sourcing ▾ > Create Events ▾ > Event Details

Create an Event

Event Summary

Business Unit 50100Event ID 0000155603Round 1Version 1Event Format Buy

Event Type RFXChange to Auction

Event Status Open

*Solicitation Type : Request for Proposal ▾

*Event Name Test

Description RFP Sample Description

Time Zone EST

Preview Date 12/11/2019 5yTime 12:41PM

Start Date 12/25/2019 5yTime 12:41PM

End Date 01/04/2020 5yTime 12:41PM

Copy From ▾Go

Preview By: By Line ▾

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

* Event Settings and Options
Event Comments and Attachments
Event Header Bid Factors

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Event Constraints

Step 2: Configure Line Items
Create line listings for this event.

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Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

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Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event

Post

Save As Template

Preview PDF



Configure Line Items (continued)

On the **Line Items** page, using the **Basic Definition** tab, configure a line item with the following:

- **Item ID**
- **Description**
- **Category**
- **UOM (Unit of measure)**
- **Qty (Quantity)**
- **Start Price**
- **Ext Amount**
- **Weighting**

Line Items ?

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1								0.00000

Event Total: 0.0000 USD

Line Weighting Total: 100 % Remaining Weight: 0%

Group Selected Lines [] OK

< Return to Event Overview

Save Event Changes

Refresh

GoTo [] Go

Add Update/Display

If line weightings are not entered, each line item is weighted equally.



Configure Line Items (continued)

Basic Definition tab:

Add a line item using the **Item ID** or **Category** lookup, or by copying from another transaction:

- **Item ID:** Click the **Look up** icon and select the item. Once selected, details for that item are displayed and include **Description**, **Category**, **UOM**, and **Start Price**. **Description**, **Category**, and **UOM** are fixed and cannot be changed. **Qty** must be entered.
- **Category:** When selecting by **Category**, a **Description**, **UOM**, **Qty**, and **Start Price** must be entered.
- **Copy From:** Copy line information from a Contract, PO, Request for Information, Requisition, Sourcing Event, Sourcing Template, etc.



Configure Line Items (continued)

- **Weighting:** This field defaults to 0.00000 and does not need to be modified.
- If line weightings were not entered, each line item is weighted equally.
- At the bottom of the **Line Items** section is **Line Weighting**. The sum of the weightings for all lines must equal 100%. If it is not equal to 100%, the **Remaining Weight** will indicate the amount left to distribute.

Favorites ▾Main Menu ▾ > Sourcing ▾ > Create Events ▾ > Event Details

Create an Event

Line Items

Business Unit 50100Event ID NEXTRound 1Version 1Event Format BuyEvent Type Auction

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Go

Filtered View

Line Items ?

Personalize | Find | View All |

First 1 of 1 Last

Basic Definition

Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
<input type="checkbox"/> 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		0.00000

Event Total: 0.0000 USD

Group Selected Lines OK

Line Weighting Total: 100 % Remaining Weight: 0%

< Return to Event Overview

GoTo Go

Save Event Changes

Refresh

AddUpdate/Display



Configure Line Items (continued)

Click on the **Advanced Definition** tab to further define lines.

The **Filtered View** changes the view on this page, by selecting **All Lines and Groups**, **Only Groups**, or **Only Lines**.

Favorites ▾Main Menu ▾>Sourcing ▾>Create Events ▾>Event Details

Create an Event

Line Items

Business Unit 50100Event ID NEXTRound 1Version 1Event Format BuyEvent Type Auction

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Go

Line Items ?

Basic DefinitionAdvanced Definition

Personalize | Find | View

Filtered View

All Lines and Groups
Only Groups
Only Lines

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints			
<input type="checkbox"/> 1	<input type="text"/>	<input type="text"/>	<input type="text"/> 1	STATE		Details	Bid Factors	No			

Event Total: 0.0000 USDLine Weighting Total: 100 %Remaining Weight: 0%

Group Selected Lines OK

< Return to Event Overview

GoTo Go

Save Event Changes

Refresh

AddUpdate/Display



Configure Line Items (continued)

On the **Line Items** page, using the **Advanced Definition** tab, configure a line item with the following sequence.

- Click on the **Details** hyperlink to access the **Line Details**.

Favorites ▾Main Menu ▾ > Sourcing ▾ > Create Events ▾ > Event Details

Create an Event

Line Items

Business Unit 50100Event ID NEXTRound 1Version 1Event Format BuyEvent Type RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Go

Filtered View

Line Items ?

Personalize | Find | View All | First 1 of 1Last

Basic DefinitionAdvanced Definition

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints			
<input type="checkbox"/> 1	<input type="text" value="5401032225"/>	4 IN. X 10 IN. CCA TREATED LUMBER	<input type="text" value="1"/>	STATE		Details	Bid Factors	No			

Event Total: 23333500.0000 USDLine Weighting Total: 100 % Remaining Weight: 0%

Group Selected Lines OK

[< Return to Event Overview](#)

GoTo Go

Save Event Changes

Refresh

AddUpdate/Display



Configure Line Items (continued)

The **Line Details** page displays.

- Add **Shipping Information; Due Date** and **Ship To** location. **IMPORTANT** - The **Ship To** is a required field. The event can not be saved without the Ship To field being completed.

Navigation: Favorites ▾ Main Menu ▾ > Sourcing ▾ > Create Events ▾ > Event Details

[Create an Event](#)
[Line Details](#)

GoTo Line: 1 - 5401032225 4 IN. X 10 IN. CCA TREATED LUM ▾ Next Previous

Event ID: NEXT
Line: 1
Item ID: 5401032225
Description: 4 IN. X 10 IN. CCA TREATED LUMBER

Requested Quantity: 5000000.0000
Start Price: 4.6667
Physical Nature: Goods ▾

☐ Item Biddable Only if Grouped

Shipping Information ? Find | View All First 1 of 1 Last

Schedule: 1
Quantity: 5000000.0000
Ship Via:

Due Date: 01/16/2020
Ship To: RT 288 SDM
Freight Terms:
Ship From:

Bid Parameters ?

☐ Bid Required
Reserve Price:
Min Quantity: 0.0000
Max Quantity: 0.0000
Bid Quantity Rule: Bid Up to Maximum Quantity ▾
Alternate UOM: Not Allowed ▾
☐ User Defined Price Breaks
☐ Bidder Defined Price Breaks

Item Specification ?

Line Image ?

[< Return to Event Lines Page](#)

Once all data is entered, click the **Return to Event Lines Page** hyperlink to return to the **Line Items** page.



Configure Line Items (continued)

On the **Line Items** page, using the **Advanced Definition** tab, configure a line item with the following:

- **Line Comments** and **Attachments** icon: Add comments and upload attachments. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course.
- Squiggly lines inside the **Line Comments** and **Attachments** icon indicates comments or attachments have been added to the line.
- Flag your comment to be sent to the Bidder and/or included on the award.
- After comments have been entered, click **OK** to return to the **Line Items** page.
- From the **Line Items** page, click **Return to Event Overview**.

Modify an Event

Line Items

Business Unit 50100 Event ID 0000153663 Round 1 Version 1 Event Format Buy Event Type RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Purchase Order Go Filtered View All Lines and Groups

Line Items ? Personalize Find View All First 1-3 of 3 Last

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints
1	0051404000	ABRASIVES, PLASTONE ABRASIVES, PLASTONE	1	STATE		Details	Bid Factors	No

Sourcing Line Comments

Modify an Event

Line Comments and Attachments

Event ID 0000153663 Line Number 1

Enter Comments ? Find View All First 1 of 1 Last

Comments:

AWARD: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The VDOT may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous (Code of Virginia, § 2.2-4359D). Should the VDOT determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by

☐ Send To Bidder ☒ Include On Award Fetch Item Specs Standard Comments

Add Attachment

OK Cancel Refresh



Configure Line Items (continued)

On the **Line Items** page, using the either **Basic Definition** or **Advanced Definition** tab, configure a line item with the following:

During event creation, users can select lines that they want to group to attempt to get better pricing through a bundled price quote.

- **Add Selected Lines to Group:** To award specific lines by group, simply select the checkbox for the lines to be grouped.
- Enter the details and click **OK** and **Return to Event Overview**.

Favorites ▾Main Menu ▾Sourcing ▾Create Events ▾Event Details

Create an Event

Line Items

Business Unit 50100Event ID NEXTRound 1Version 1Event Format BuyEvent Type RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From ▾Go

Filtered View All Lines and Groups ▾

Line Items ?

Personalize | Find | View All | First 1 of 1 Last

Basic DefinitionAdvanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
<input type="checkbox"/> 1	5401032225	4 IN. X 10 IN. CCA TREATED LUMBER	5401032	LF	5000000.00	\$4.6667 x	\$23,333,500.00	0.00000

Event Total: 23333500.0000 USDLine Weighting Total: 100 %Remaining Weight: 0%

Group Selected Lines [Add to New Group]OK

Group ID

Description

< Return to Event Overview

GoTo ▾Go

Save Event Changes

Refresh

AddUpdate/Display



Select Bidders/Offerors to Invite

Next, under **Step 3: Select Bidders to Invite**, click on the **Bidder Invitations** hyperlink to go to the event **Invite Bidders** page.

[Modify an Event](#)

Event Summary

Business Unit 50100 Event ID 0000153663 Round 1 Version 1 Event Format Buy

Event Type RFX [Change to Auction](#)

Event Status Open

*Solicitation Type : IFB Sealed Contract

*Event Name RFP Sample

Description RFP Sample Description

Time Zone EST

Preview Date 01/20/2017 Time 1:08PM

Start Date 02/03/2017 Time 1:08PM

End Date 02/13/2017 Time 1:08PM

Copy From Purchase Order [Go](#)

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)
[Event Constraints](#)

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)



Select Bidders/Offerors to Invite (continued)

State procurement guidelines require that all events be open to the public.

On the **Invite Bidders** page, select the **Public Event** checkbox to open the event to the public.

Click **Save Event Changes**.

Favorites ▾

Main Menu ▾ > Sourcing ▾ > Create Events ▾ > Event Details

Modify an Event

Invite Bidders

Business Unit 50100 Event ID 0000155590 Round 1 Version 1 Event Format Buy Event Type RFx

☒ Public Event

Bidder Invitation List ?

Personalize | Find | View All |

First ◀ 1 of 1 ▶ Last

Select	Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	*Dispatch Method		
<input type="checkbox"/>	PUBLIC_AUC	Public		1	This is a Public Event			Email		

Search for Bidders

Dispatch Lines

Save Bidders as Group

Save Event Changes

GoTo ▼

< Return to Event Overview

Return to Search

Refresh



Invite Collaborators

Collaborators are individuals who are asked by the Strategic Sourcing Buyer to provide some type of expertise and/or comments during the Strategic Sourcing process. It is possible to route an event to other users (Collaborators) for input.

After returning to the **Event Summary** page, under **Step 4: Invite Collaborators**, click on the **Event Collaborators** hyperlink to go to the event **Invite Collaborators** page. This is optional.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

* Event Settings and Options
Event Comments and Attachments
Event Header Bid Factors

Payment Terms and Contact Info
Event Constraints

Step 2: Configure Line Items
Create line listings for this event.

* Line Items

Item Line Defaults

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event

Post Event

Save As Template

For more detailed information about **Collaboration**, see the job aid entitled **501 PR345: Strategic Sourcing Collaboration** located on the Cardinal website in **Job Aids** under **Training**.



Invite Collaborators (continued)

Events do not route to managers, or other users, unless they are selected as a Collaborator. A routing sequence is established inviting Collaborators. Modify the sequence to ensure the event is reviewed by the Collaborators in the order desired.

When adding Collaborators, a link to the event routes to their worklist. The user, as the originator of the event, will receive a message when all collaboration is complete.

Once all the details have been set and Collaborators added, click **OK** and then **Save Event** to return to the **Event Summary** page.

Modify an Event

Event Collaboration Details

Collaboration Due Date 04/07/2017 Time 4:15PM

Process Type Sequential

Review By Notifications

Review Sections

Seq Nbr 1 Section Name Bid Factor Default Option None

Process Type Sequential Section Review By Date Time

Collaborators

Seq Nbr	Userid	Name	Review By Date	Time	Delegate User ID	Name
1	A.HETZER	Hetzer, Andy (VDOT)				
2	A.SCOTT	Scott, Andrew (VDOT)				

Find Collaborators Save As Group

Add Section

OK Cancel Refresh



Post an Event for Bidding

Once the event creation steps are complete, be sure to click **Save Event**. The next step is to **Post** the event for bidding.

- Prior to posting the event, click **Preview PDF** to send an e-mail to the Buyer with a detailed PDF event summary. This PDF will be used for the manual posting to eVA.
- Click **Post** to post the event for bidding.
- The **Preview PDF** and **Post** buttons are no longer available.

The screenshot displays the event creation process with three main steps:

- Step 1: Define Event Basics**
Enter basic information, general settings and optional rules for this event.
 - * Event Settings and Options
 - Event Comments and Attachments
 - Event Header Bid Factors
 - Payment Terms and Contact Info
 - Event Constraints
- Step 2: Configure Line Items**
Create line listings for this event.
 - * Line Items
 - Item Line Defaults
- Step 3: Select Bidders to Invite**
Send out targeted invitations to this event, designate it as a public event, or both.
 - * Bidder Invitations

At the bottom, there are three buttons: **Save Event**, **Post**, and **Preview PDF**. A red arrow points from the **Post** button to a message box on the left. Another red arrow points from the **Preview PDF** button to a message box on the right.

Message Box (Left):

Message

This will submit the Event for Approval. (18058,207)

Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.

OK Cancel

Message Box (Right):

Message

Do you want to create preview Event PDF and send it to ? (18058,1925)

Select Yes to create the file or No to return to the Event.

Yes No



Post an Event for Bidding (continued)

The **Event Details** PDF document that is sent to the Buyer is detailed below. This document may be included with the information sent to eVA to be posted on Virginia's eProcurement Portal.

Event Details

Commonwealth of Virginia Department of Transportation

Event ID	Format	Type	Page
50100-0000150219	Buy	IFB Sealed Contract	1
Event Round	Version		
1	1		
Event Name			
MJH TEST001			
Start Date/Time	Close Date/Time		
10/17/2011 16:58:00 EDT	10/18/2011 15:58:00 EDT		

Event Currency: US Dollar
Bids allowed in other currency: No

Bidder: General Public

Submit To: VA Dept of Transportation
VDOT Central Office
1201 E Broad St
Richmond VA 23219
United States
Contact: Super User PR
Phone:
Email:

Event Description

I. PURPOSE:

The Virginia Department of Transportation (herein referred to as "VDOT") is soliciting bids from interested firms to provide

PERIOD OF CONTRACT: From _____ through _____ (renewable)

The IFB must state either "from date of award," or specified date to a specified ending date, or delivery of goods or services.

If it will be a renewable term contract, put the word "renewable" in parenthesis after the "through" date if the contract contains a renewal clause. This will let potential bidders know right away if you anticipate the contract to go beyond the initial period. This is also restated under the Special Terms and Conditions under the Term of Contract clause.

See the example IFB provided.

II. QUESTIONS REGARDING THIS INVITATION FOR BID:

Any questions regarding this invitation for bid shall be addressed to Mr./Ms. Contract Officers Name at (804) 000-0000. The issuing office shall determine whether any addendum should be issued as a result of any questions or other matters raised.



Lesson 2: Summary

2

Employee Self-Service Overview

In this lesson, you learned:

- Copying from another document provides a shortcut that eliminates some duplicate entry. You can create an event by copying from a:
 - Requisition
 - Event
 - Contract
 - PO
- There are five steps to creating a new Strategic Sourcing Event:
 - Define Event Basics
 - Configure Line Items
 - Select Bidders to Invite
 - Invite Collaborators (optional)
 - Post Event



Lesson 3: Introduction

3

Maintain Events

This lesson covers the following topics:

- Using the Event Workbench
- Change an Event - Versions



Using the Event Workbench

The **Event Workbench** is used to view and manage events, as well as create new versions (addendums). Using the **Event Workbench**, the Strategic Sourcing Buyer can also cancel an event.

Navigate to the **Event Workbench** page using the following path:

Main Menu > Sourcing > Maintain Events > Event Workbench

Event Workbench

Search Criteria

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With Plan

From Start Date

From End Date

Category

Item ID

Description

Plan Name

To Start Date

To End Date

Sort With

Sort Order

☐ Only show Events I created

☒ Only show Active Events

☐ Use my search defaults

Search

Reset

Default Search Preferences

Legend

Search Results

Find | View 100

First 1-25 of 1422 Last

Event ID	Name	Format	Type	Unit	Status				
0000155448	Testing 98765	Buy	RFx	50100	0hrs,4mins,10secs	✖	📖	📄	🗨️
0000155444	STONE CLASS I	Buy	RFx	50100	Open	✖	📖		
0000155443	STONE CLASS I	Buy	RFx	50100	Open	✖	📖		



Using the Event Workbench (continued)

The **Event Workbench** page has three sections: **Search Criteria**, **Legend**, and **Search Results**.

The **Search Criteria** section allows searching for a specific event using any combination, or all, of the available fields. The criteria helps to narrow the search results.

Event Workbench

Search Criteria

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With Plan

From Start Date

From End Date

To Start Date

To End Date

Category

Item ID

Description

Plan Name

Sort With

Sort Order

☐ Only show Events I created

☒ Only show Active Events

☐ Use my search defaults

Search

Reset

Default Search Preferences

Legend

Pause

Resume

Cancel

Approval Status

Event History

Analyze Bids

Notice of Intent to Award

Notice of Award

Edit Event

New Version

View Collaboration

Collaboration Available

Collaboration Checked Out

Bid History

Notify Me On Check-In

View Award Details

Search Results

Find | View 100

First

1-25 of 1422

Last

Event ID	Name	Format	Type	Unit	Status				
▶ 0000155395	TRAFFIC CONTROL SE...	Buy	RFx	50100	0hrs,10mins,19secs	✖	📖	📄	🔍
▶ 0000155448	Testing 98765	Buy	RFx	50100	Event Completed	✖	📖	🔍	📄
▶ 0000155444	STONE CLASS I	Buy	RFx	50100	Open	✖	📖		
▶ 0000155443	STONE CLASS I	Buy	RFx	50100	Open	✖	📖		
▶ 0000155442	Stone Class I	Buy	RFx	50100	Open	✖	📖		
▶ 0000155441	Copy from Req	Buy	RFx	50100	Open	✖	📖		
▶ 0000155438	Copy req lines	Buy	RFx	50100	Open	✖	📖		
▶ 0000155435	Event Sole Source	Buy	RFx	50100	Event Completed	✖	📖	🔍	📄

Using the Event Workbench (continued)

The **Legend** section of the **Event Workbench** page can be expanded to see descriptions for each of the icons used in the **Search Results**.

Event Workbench

Search Criteria

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With

Plan

From Start Date

From End Date

Category

Item ID

Description

Plan Name

To Start Date

To End Date

Sort With

Sort Order

☐ Only show Events I created

☒ Only show Active Events

☐ Use my search defaults

Search

Reset

Default Search Preferences

Legend

Pause

Resume

Cancel

Approval Status

Event History

Analyze Bids

Notice of Intent to Award

Notice of Award

Edit Event

New Version

View Collaboration

Collaboration Available

Collaboration Checked Out

Bid History

Notify Me On Check-In

View Award Details

































Search Results

Find | View 100 | First | 1-25 of 1422 | Last

Event ID	Name	Format	Type	Unit	Status				
▶ 0000155395	TRAFFIC CONTROL SE...	Buy	RFx	50100	0hrs,10mins,19secs				
▶ 0000155448	Testing 98765	Buy	RFx	50100	Event Completed				
▶ 0000155444	STONE CLASS I	Buy	RFx	50100	Open				
▶ 0000155443	STONE CLASS I	Buy	RFx	50100	Open				
▶ 0000155442	Stone Class I	Buy	RFx	50100	Open				
▶ 0000155441	Copy from Req	Buy	RFx	50100	Open				
▶ 0000155438	Copy req lines	Buy	RFx	50100	Open				
▶ 0000155435	Event Sole Source	Buy	RFx	50100	Event Completed				

Using the Event Workbench (continued)

Event Workbench Legend explanation of icons

Legend	
 Pause	 Resume
 Cancel	 Approval Status
 Event History	 Analyze Bids
 Notice of Intent to Award	 Notice of Award
 Edit Event	 New Version
 View Collaboration	 Collaboration Available
 Collaboration Checked Out	 Bid History
 Notify Me On Check-In	 View Award Details
 Pause: Not used	
 Resume: Not used	
 Cancel: Cancel the event. This cannot be undone.	
 Approval Status: Determine whether event is approved	
 Event History: View the event's Version History. Stage and Status	
 Analyze Bids: View the Status and bids for the event	
 Notice of Intent to Award: View the details of the NOIA	
 Notice of Award: View the details of the NOA	
 Edit Event: Edit the version of the selected event	
 New Version: Create a new version of the selected event	
 View Collaboration: View collaboration input for the event	
 Collaboration Available: Add recommendations	
 Collaboration Checked Out: Request notification when event is checked out for collaboration	
 Bid History: View the bid/proposal invitation status	
 Notify Me on Check-In: Request notification when event is checked in after collaboration comments are added	
 View Award Details: Displays Award details to user	

Using the Event Workbench (continued)

The **Search Results** section of the **Event Workbench** lists all events matching the search criteria. Click the arrow on the left side of the line to display the line items for the selected event. Click on the **Event ID** hyperlink to open the **Modify an Event – Event Summary** page. This is the same page where the initial five create event steps were configured. From this page, the event details can be viewed.

Event Workbench

Search Criteria

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With Plan

From Start Date

From End Date

Category

Item ID

Description

Plan Name

Legend

Search Results

Event ID	Name	Format	Type	Unit	Sta
0000153663	RFP Sample	Buy	RFx	50100	02/13

[Personalize](#) | [Find](#) | [View](#)

Line	Category	Item ID	Item Description
1	0051404	0051404000	ABRASIVES, PLASTONE ABRASIVES PLASTONE
2	0051404	0051404055	ABRASIVES, PLASTONE 1 IN. X 50 Y ROLL, 320 GRIT
3	0051404	0051404115	ABRASIVES, PLASTONE 1-1/2 IN. W, FT. ROLL, 120 GRIT

▶ 0000153662 IFB Buy RFx 50100 Open

[Modify an Event](#)

[Event Summary](#)

Business Unit 50100 **Event ID 0000153663** Round 1 Version 1 Event Format Buy

Event Type RFx

Event Status Posted

*Solicitation Type : IFB Sealed Contract

Event Name RFP Sample

Description RFP Sample Description

Time Zone EST

Preview Date 01/20/2017 Time 1:08PM

Start Date 02/03/2017 Time 1:08PM

End Date 02/13/2017 Time 1:08PM

Copy From Go

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* Event Settings and Options

Event Comments and Attachments

Event Header Bid Factors

Payment Terms and Contact Info

Event Constraints

Step 2: Configure Line Items

Create line listings for this event.

* Line Items

Item Line Defaults



Change an Event: Versions

Event version control is used to track changes (addendums) made to a posted event.

Use the **Event Workbench** to create and edit versions. When viewing a multiversion event, the system always displays the most recent version of the event. When creating a new event version, the version number increments by one. When posting the new version, the previous version becomes read-only.

To create a new version, click the **New Version** icon on the **Event Workbench**.

Favorites ▾Main Menu ▾> Sourcing ▾> Maintain Events ▾> Event Workbench

Event Workbench

▼ Search Criteria

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With

From Start Date

From End Date

Category

Item ID

Description

Plan Name

To Start Date

To End Date

Sort With

Sort Order

☐ Only show Events I created

☒ Only show Active Events

☐ Use my search defaults

Search


Reset

Default Search Preferences

► Legend

Search Results

Find | View 100First1-25 of 1437Last

Event ID	Name	Format	Type	Unit	Status					
▶ 0000150035	FOB Stone Bedford ...	Buy	RFx	50100	Pending Award	✕	📖	🔍		📄
▶ 0000150009	delete - entered i...	Buy	Auction	50100	Open	✕	📖			
▶ 0000150006	Lighting Maintenan...	Buy	RFx	50100	Open	✕	📖			
▶ 0000150012	Replace Hydraulic ...	Buy	RFx	50100	Pending Award	✕	📖	🔍	📄	📄
▶ 0000150014	SET ASIDE FOR SMAL...	Buy	RFx	50100	Pending Award	✕	📖	🔍	📄	📄



Change an Event: Versions (continued)

After selecting the **Create a New Version** icon, a pop-up message appears to confirm creation of a new version. Select **Yes** to create the new version. The **Event Summary** page will be displayed.

A screenshot of a web-based message dialog box. The title bar at the top says "Message". The main content area contains the text "Create New Version? (18058,8129)" followed by a paragraph: "This operation will create a new version of the event. The current active version will not be inactivated until the new version has been posted. Select 'Yes' if you wish to create a new version for this event. Otherwise, select 'No'." At the bottom of the dialog, there are two buttons: "Yes" and "No". The "Yes" button is highlighted with a red dashed border. The dialog box is set against a background that shows a portion of a web page with a sidebar and a main content area. At the very bottom of the screenshot, a status bar shows "ent Completed" and several small icons.



Lesson 3: Summary

3

Maintain Events

In this lesson, you learned:

- The Event Workbench page is used to maintain events.
- Multiversion events are created using the Event Workbench when you make changes (addendums) to a posted event.



Lesson 4: Introduction

4

Analyze Bids/Proposals and Awarding Events

This lesson covers the following topics:

- Analyze Bid/Proposal Responses
- Collaborate on Bid/Proposal Responses (optional)
- Award and Post the Event (By Line, Group, or Grand Total)
- Create a Purchase Order/Contract
- Cancel a Purchase Order/Contract Associated to an Event



Analyze Bid/Proposal Responses

Use the Event Workbench to review the bids. Once the event end date has passed and all the bids have been uploaded from eVA, the **Analyze Event** pages are available. Simply click on the **Analyze** icon next to the event with bids to be reviewed. The **Analyze Total** page will display.

Navigate to the **Event Workbench** page using the following path:

Main Menu > Sourcing > Maintain Events > Event Workbench

Favorites ▾Main Menu ▾> Sourcing ▾> Maintain Events ▾> Event Workbench

Event Workbench

Search Criteria

Business Unit50100

Event ID

Created By

Event Format

Event Type

Event Status

Associated With Plan

From Start Date

From End Date

Category

Item ID

Description

Plan Name

To Start Date

To End Date

Sort With

Sort Order

☐ Only show Events I created

☒ Only show Active Events

☐ Use my search defaults

Search

Reset

Default Search Preferences

Legend

Pause

Resume

Cancel

Approval Status

Event History

Analyze Bids

Notice of Intent to Award

Notice of Award

Edit Event

New Version

View Collaboration

Collaboration Available

Collaboration Checked Out

Bid History

Notify Me On Check-In

View Award Details

Search Results

Find | View 100First1-25 of 1437Last

Event ID	Name	Format	Type	Unit	Status				
0000150035	FOB Stone Bedford ...	Buy	RFx	50100	Open	×	📖		📄
0000150009	delete - entered i...	Buy	Auction	50100	Open	×	📖		
0000150006	Lighting Maintenan...	Buy	RFx	50100	Open	×	📖		
0000150012	Replace Hydraulic ...	Buy	RFx	50100	Pending Award	×	📖	🔍	📄
0000150014	SET ASIDE FOR SMAL...	Buy	RFx	50100	Pending Award	×	📖	🔍	📄



Analyze Bid/Proposal Responses (continued)

From the **Analyze Total** page use the optional **Analyze Export** feature which allows, exporting bid/proposal data to a spreadsheet.

On the **Go To** box drop-down menu, select **...Analyze Export**. The **Bid Analysis Export** page will be displayed.

Favorites ▾Main Menu ▾>Sourcing ▾>Maintain Events ▾>Event Workbench >Analyze Events

Analyze Total

Analyze TotalAnalyze Line

Business Unit:50100Event ID:0000155539Round:1Version:1Event Name:Thermoplastic Pavement Marking Material

Event Format:BuyEvent Type:RFxCurrency:USDEnd Date:07/30/2019 9:40AM EDTStatus:Awarded

Go To:
...
...Analyze Export
Associate Planning Task
Award Events
Create New Round
Document Status Inquiry
Event Comments and Attachments
Invite Collaborators
Review Optimization

Bid Analysis and Display Options ?

Analysis

	Bidder Name CROWN TECHNOLOGY LLC	Ozark Materials LLC	Ennis-Flint Inc	
Event Version Responded To	1	1	1	
Bid Number	1	1	1	
Total Bid Amount	132,300.00	123,420.00	122,540.00	
Total Bid Cost	132,300.00	123,420.00	122,540.00	116,700.00
Total Event Score	0.00	0.00	0.00	0.00
Total Header Cost	0.00	0.00	0.00	0.00
Total Header Score	0.00	0.00	0.00	0.00

Bid ActionNA ▾Reject ReasonAward by PercentHide Bid

NA ▾NA ▾NA ▾Award ▾

100.000



Analyze Bid/Proposal Responses (continued)

On the **Bid Analysis Export** page, you can select to email the report to yourself and/or other(s).

- Click the **+ / -** icon to add/delete email recipients.
- In the **Filter Bids** section, choose the bids to be included in the export file.
- Click **Create Analysis Export**.

The **Analyze Events** page will be saved, and a process will be kicked off to create the **Bid Analysis Export file** and email the selected recipients.

Once the export has been kicked off, click the **Return to Analyze Event** hyperlink to return back to the **Analyze Total** page.

Bid Analysis Export

Business Unit: 50100 Event ID: 0000155539 Round: 1 Version: 1 Event Name: Thermoplastic Pavement Marking Material

Event Format: Buy Event Type: RFx Currency: USD Finish: 07/30/19 9:40AM EDT Status: Awarded

Analysis Export File Recipients Personalize | First 1 of 1 Last

*Name	*Email Address	Notify
1 Toya N. (VDOT) Peterson	xxtoya.peterson@vdot.virginia.gov	<input checked="" type="checkbox"/> + -

Filter Bids

Select the bids you want to include in your Analysis Export file.

Select All Deselect All

☒ Award ☒ Counter ☒ Disallow ☒ Reject ☒ <No Action>

☒ Display Disqualified Bids ☒ Display Withdrawn Bids

Filter Bid Responses

☐ Display Delta Responses

Create Analysis Export Return to Analyze Event

To create a bid analysis export:

1. Enter the email addresses of those you would like to receive the export.
2. Click on the Create Analysis Export button. At this point the Analyze Events pages will be saved, and a process will be kicked off to create the Bid Analysis Export file and email the recipients.



Analyze Bid/Proposal Responses (continued)

Favorites ▾Main Menu ▾> Sourcing ▾> Maintain Events ▾> Event Workbench > Analyze Events

Bid Analysis Export

Business Unit:50100Event ID:0000155539Round:1Version:1Event Name:Thermoplastic Pavement Marking Material

Event Format:BuyEvent Type:RFxCurrency:USDFinish:07/30/19 9:40AM EDTStatus:Awarded

Analysis Export File Recipients

Personalize | 1 of 1

	*Name	*Email Address	Notify	
1	Toya N. (VDOT) Peterson	xxtoya.peterson@vdot.virginia.gov	<input checked="" type="checkbox"/>	<div>+ -</div>

Filter Bids

Select the bids you want to include in your Analysis Export file.

Select AllDeselect All

☒ Award☒ Counter☒ Disallow☒ Reject☒ <No Action>

☒ Display Disqualified Bids☒ Display Withdrawn Bids

Filter Bid Responses

☐ Display Delta Responses

Create Analysis ExportReturn to Analyze Event

To create a bid analysis export:

1. Enter the email addresses of those you would like to receive the export.
2. Click on the Create Analysis Export button. At this point the Analyze Events pages will be saved, and a process will be kicked off to create the Bid Analysis Export file and email the recipients.

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Analyze Bid/Proposal Responses (continued)

The **Event Analysis** export report is delivered to each recipient's email. The example below shows two bidders at the bottom right with the **Bidder Name** and **Total Bid Amount**.

Event Analysis																						
PeopleSoft Strategic Sourcing																						
Event ID	Format	Type	Round	Version																		
50100-0000150762	Buy	RFx	1	3																		
Event Name																						
Training Sourcing Event																						
Start Time		Finish Time																				
01/22/2013 10:22 AM EDT		01/22/2013 10:23 AM EDT																				
Event Description																						
I. PURPOSE:																						
The Virginia Department of Transportation herein referred to as "VDOT" is soliciting bids from interested firms to perform planned (by the route) and unplanned/on-call (site specific) tree pruning services, in accordance of the performance specifications herein, within the "Name" District along the right-of-way on the listed routes within "Name(s)" Counties.																						
PERIOD OF CONTRACT: From _____ through _____																						
Awards will be made on a Grand Total basis, per Lot:																						
NOTE: This is a requirements contract and the quantities listed in Attachment D and the within the pricing schedule are estimated. VDOT reserves the right to subtract routes to be pruned. The pruning of routes listed in Attachment D shall be performed on both sides of the route, unless otherwise identified. Refer to Attachment D for listed routes, estimated shoulder lengths, vertical clearance and horizontal clearance. Roadway shoulders may include up to 4 sides on divided highways.																						
Report Date: 01/22/2013 10:38 AM EDT																						
Event Currency: US Dollar																						
Bids Allowed in Other Currency: No																						
Factor General Score into Line Score: No																						
Included Bids: All																						
Highlight Delta Response: No																						
<table border="1"><tr><td>Bidder Name:</td><td>Land & Sea Inc</td><td>SIS-USA inc</td></tr><tr><td>Event Version:</td><td>3</td><td>3</td></tr><tr><td>Bid Number:</td><td>1</td><td>1</td></tr><tr><td>Total Bid Amount:</td><td>2450</td><td>3230</td></tr><tr><td>Total Event Score:</td><td>0</td><td>0</td></tr><tr><td>Award By Percent</td><td></td><td></td></tr></table>					Bidder Name:	Land & Sea Inc	SIS-USA inc	Event Version:	3	3	Bid Number:	1	1	Total Bid Amount:	2450	3230	Total Event Score:	0	0	Award By Percent		
Bidder Name:	Land & Sea Inc	SIS-USA inc																				
Event Version:	3	3																				
Bid Number:	1	1																				
Total Bid Amount:	2450	3230																				
Total Event Score:	0	0																				
Award By Percent																						



Analyze Bid/Proposal Responses (continued)

The **Event Analysis** below shows responses broken down by Bidder. Each response is scored based upon the weightings in the original event.

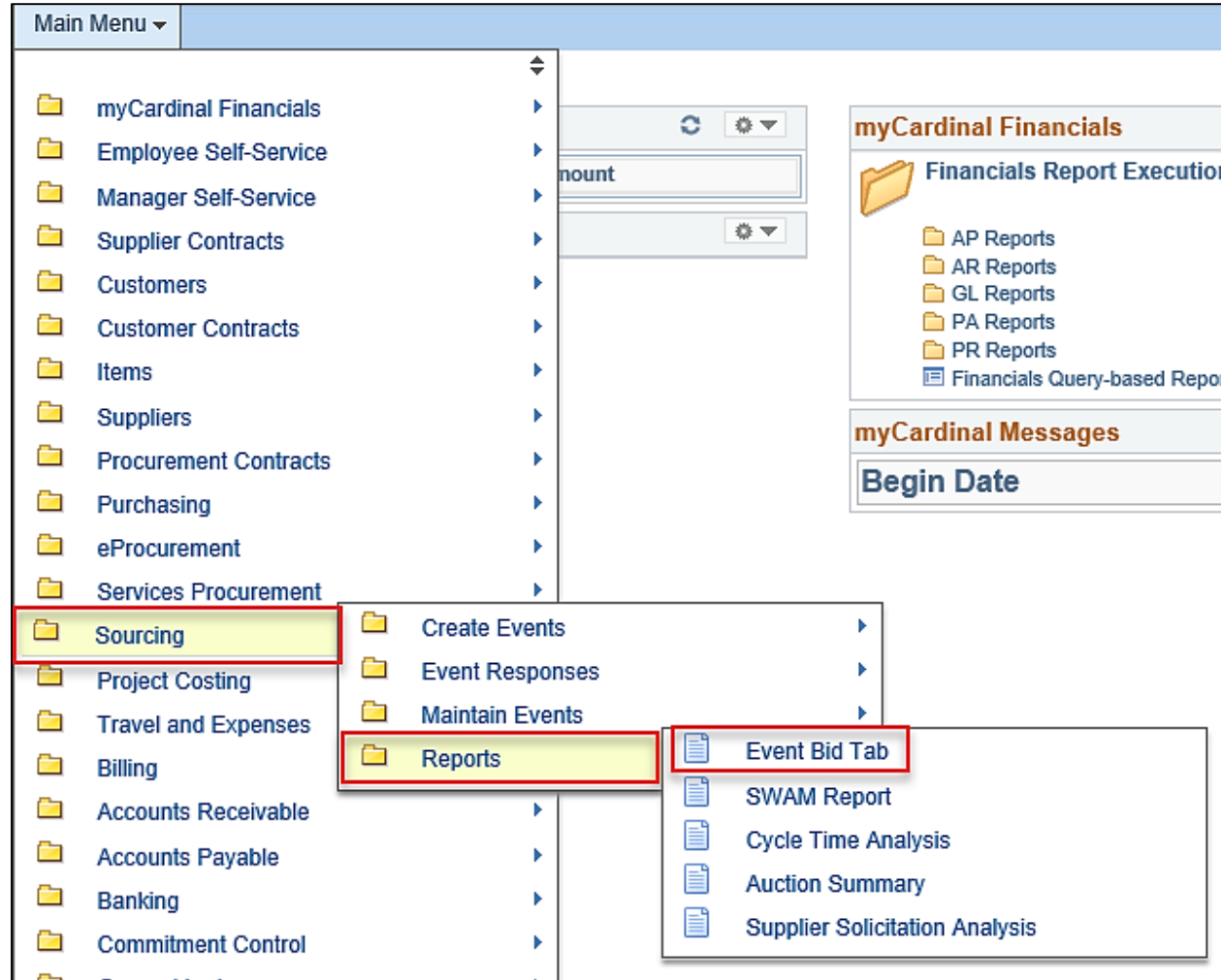
Event Analysis				
PeopleSoft Strategic Sourcing				
Event ID	Format	Type	Round	Version
50100-0000150762	Buy	RFx	1	3
Event Name				
Training Sourcing Event				
Start Time		Finish Time		
01/22/2013 10:22 AM EDT		01/22/2013 10:23 AM EDT		
Report Date: 01/22/2013 10:38 AM EDT				
Event Currency: US Dollar				
Bids Allowed in Other Currency: No				
Factor General Score into Line Score: No				
Included Bids: All				
Highlight Delta Response: No				
Line Details				
Line: 1	Item ID: 9888878811	Line Quantity: 150	Weighting:	0.00%
Bid Required: Yes Reserve Price: No				
Description: TREE TRIMMING AND BRUSH REMOVAL, PER VADOT SPECIFICATIONS GREATER THAN 6 IN. <= 12 IN. (DBH) TREE REMOVAL				
Price Details		Worst	Weighting	
What is your bid price?		265	100.00%	
Quantity Details		Requested		
Minimum Quantity:		0		
Unit of Measure:		EA		
Bidder Name: Land & Sea Inc SIS-USA inc				
Event Version: 3 3				
Bid Number: 1 1				
Line Bid Quantity: 150 150				
Total Line Bid Amount: 150 300				
Total Line Score: 100 99.62				
Unit Bid Price: 1 2				
Score: 100 99.62				
Minimum Quantity: 0 0				
Bid Unit of Measure: EA EA				
Conversion Rate: N/A N/A				
Award By Percent				
Award Quantity				



Analyze Bid/Proposal Responses (continued)

The User can also review bidder information by running the Bid Tab Report.

Navigation: **Main Menu>Sourcing>Reports>Event Bid Tab**





Analyze Bid/Proposal Responses (continued)



Report ID: VRPR008

Commonwealth of Virginia Department of Transportation BID TABULATION REPORT

Run Date: 4/14/2017

Run Time: 14:23 PM

Business Unit: 50100
Event ID: 0000150024

Buyer: RONIQUÉ.DAY

Closing Date: 01/04/2012
Closing Time: 3:45:00 PM

Page 1 of 7

<u>Supplier ID</u>	<u>Supplier</u>	<u>SWAM Type</u>	<u>Group / Line# / Item</u>	<u>Item Description</u>	<u>Quantity</u>	<u>Unit Price</u>	<u>Extended Price</u>	<u>Awarded</u>
Line Type: L 0000012056	Blake Crosby							
			1- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			2- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			3- 9684431260	GRAFFITI REMOVAL SERVICES MOBILIZATION, GRAFFITI REMOVAL SERVICES	1.00	\$500.00	\$500.00	
			4- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			5- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			6- 9684431260	GRAFFITI REMOVAL SERVICES MOBILIZATION, GRAFFITI REMOVAL SERVICES	1.00	\$500.00	\$500.00	
			7- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			8- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			9- 9684431260	GRAFFITI REMOVAL SERVICES MOBILIZATION, GRAFFITI REMOVAL SERVICES	1.00	\$500.00	\$500.00	
			10- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			11- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			12- 9684431260	GRAFFITI REMOVAL SERVICES MOBILIZATION, GRAFFITI REMOVAL SERVICES	1.00	\$500.00	\$500.00	
			13- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			14- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			15- 9684431260	GRAFFITI REMOVAL SERVICES MOBILIZATION, GRAFFITI REMOVAL SERVICES	1.00	\$500.00	\$500.00	



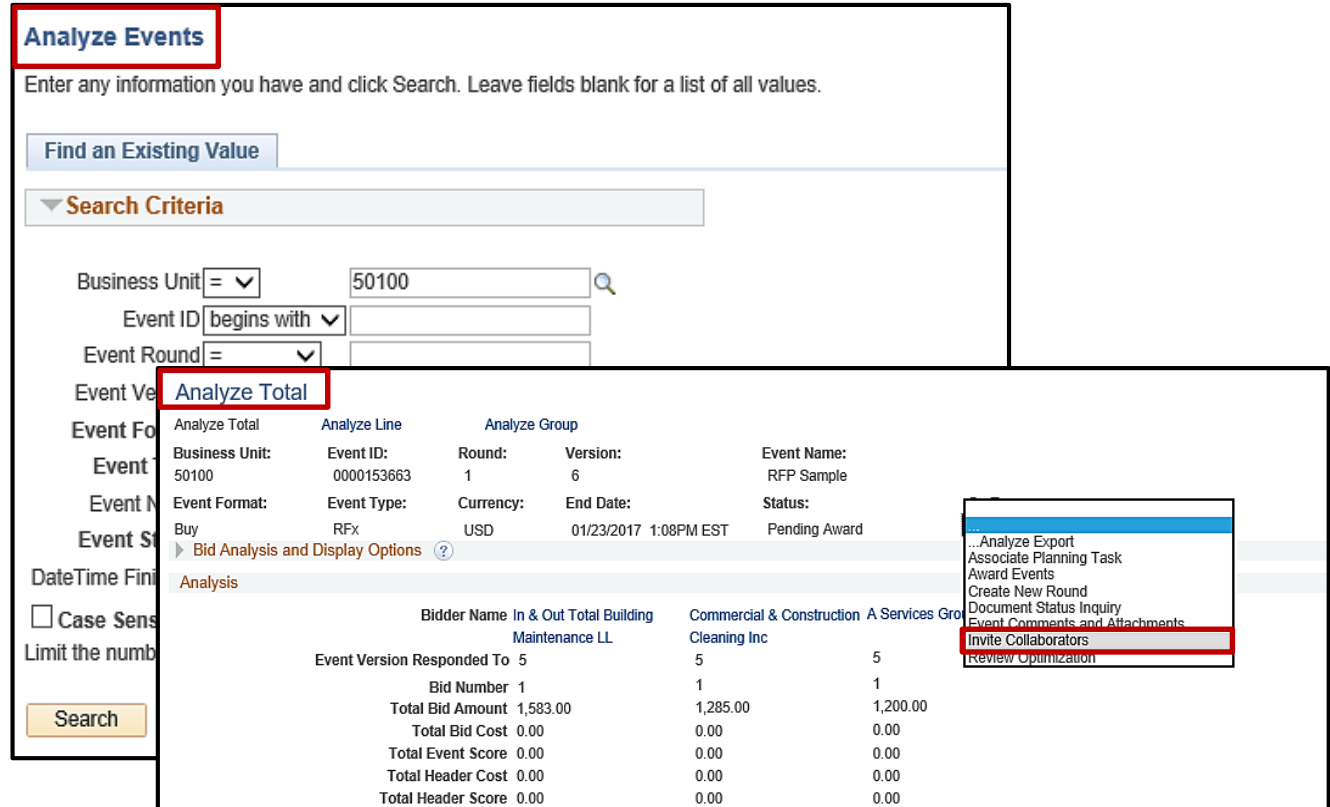
Collaborate on Bid/Proposal Responses

Use the optional **Invite Collaborators** feature to send bid/proposal responses to specific collaborators' worklists for view and comment. Invite any users with the role of Event Collaborator to contribute to event creation or analysis. During bid analysis, Collaborators can manually score text-based bid factors (i.e. a question requiring a text answer), enter responses to hidden bid factors, and change bid factor weightings. The system calculates an average score across all collaborators.

Navigate to the **Event Collaboration Details** page using the following path:

Main Menu > Sourcing > Maintain Events > Analyze Events

- Enter the event search criteria.
- Select the event for collaboration. The **Analyze Total** page will display.
- Click on the **Go To** box drop-down arrow and select **Invite Collaborators**. The **Event Collaboration Details** page will be displayed.



Analyze Events

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Business Unit = 50100

Event ID begins with

Event Round =

Event Version

Event Format

Event Name

Event Status

Date Time Filter

☐ Case Sensitive

Limit the number of results

[Search](#)

Analyze Total

Analyze Total	Analyze Line	Analyze Group
Business Unit: 50100	Event ID: 0000153663	Round: 1
Event Format: Buy	Event Type: RFX	Currency: USD
	End Date: 01/23/2017 1:08PM EST	Status: Pending Award
Bid Analysis and Display Options		
Analysis		
Event Version Responded To: 5	Bidder Name: In & Out Total Building Maintenance LL	Commercial & Construction A Services Group
Bid Number: 1	Cleaning Inc	
Total Bid Amount: 1,583.00		
Total Bid Cost: 0.00		
Total Event Score: 0.00		
Total Header Cost: 0.00		
Total Header Score: 0.00		

[...Analyze Export](#)
[Associate Planning Task](#)
[Award Events](#)
[Create New Round](#)
[Document Status Inquiry](#)
[Event Comments and Attachments](#)
[Invite Collaborators](#)
[Review Optimization](#)



Collaborate on Bid/Proposal Responses (continued)

Using the **Event Collaboration Details** page, set the **Collaboration Due Date**, the collaborators, and the **Routing Sequence** the collaborators will use to review the event. Add or subtract collaborators using the **+ / -** icons.

The Buyer may also invite other collaborators. While collaborators are analyzing the event, Cardinal sets the event status to **Collaborating Bid Analysis**.

Event Collaboration Details

Bid Analysis Review Sections

Collaboration Due Date01/31/2017Time11:00PM

Process TypeSequentialShow Bidders Name

Review By Notifications

Never

One day before

One week before

Weekly before deadline

Daily starting one week before

Review Sections

Seq NbrSection Name

1

Process TypeSequentialSection Review By DateTime

Collaborators

Seq Nbr	JserId	Name	Review By Date	Time	Delegate User ID	Name	Override Main Collaborator	Reviewed	Reviewed
1	ADAM.DIXON	Dixon, Adam (VDOT)							
2	A.HETZER	Helzer, Andy (VDOT)							

Find Collaborators

Add Section

Route To

OKCancel

For more detailed information about **Collaboration**, see the job aid entitled **501 PR345: Strategic Sourcing Collaboration** located on the Cardinal website in **Job Aids** under **Training**.

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Award and Post the Event

Once bids have been analyzed and a selection made, the winning bid will be awarded. The winning bid/proposal can be awarded by line, group, or total.

Award bids by:

- Line: use to award different lines to different suppliers
- Group: if specific line items were configured into groups that are to be awarded based on location, similar items, etc. in the **Configure Line Items** portion of the event
- Total: use to award the entire bid/proposal to one bidder



Award and Post the Event: By Line

Each line is separately considered and awarded on the **Analyze Line** page. Navigate to this page using the following path:

Main Menu > Sourcing > Maintain Events > Analyze Events

Search and select the event. The **Analyze Total** page will display. Click on the **Analyze Line** hyperlink. Next, click on the **Analyze** hyperlink next to the **Line** to be awarded. The **Analyze Line** page will display and details the extended bid response.

Analyze Line

Analyze Total

Analyze Line

Analyze Group

Business Unit: 50100

Event ID: 0000153663

Round: 1

Version: 6

Event Name: RFP Sample

Event Format: Buy

Event Type: RFx

Currency: USD

End Date: 01/23/2017 1:08PM EST

Status: Pending Award

Go To:

Line Items ?

Personalize | Find | View All |

First 1-3 of 3 Last

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	0051404000	ABRASIVES, PLASTONE ABRASIVES, PLASTONE	0051404	EA	169.00000	5.0000	0.0000	<input type="text" value="0.00000"/>	Open <input type="text"/>	Analyze
2	0051404055	ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT	0051404	RO	0.01000	1.0000	0.0000	<input type="text" value="0.00000"/>	Open <input type="text"/>	Analyze
3	0051404115	ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT	0051404	RO	0.01000	1.0000	0.0000	<input type="text" value="0.00000"/>	Open <input type="text"/>	Analyze

Save

Return to Search

[Analyze Total](#) | [Analyze Line](#) | [Analyze Group](#)



Award and Post the Event: By Line (continued)

Expand the **Factors** section to view the per unit price bid for each Bidder. Make the award selection using the **Bid Action** drop-down. The award can also be split, by quantity or percent, between different Bidders. When finished, click **OK**.

Analyze Line

Business Unit: 50100

Event ID: 0000153663

Round: 1

Version: 6

Event Name: RFP Sample

Event Format: Buy

Event Type: RFx

Currency: USD

End Date: 01/23/2017 1:08PM EST

Status: Pending Award

Line 1

Requested Quantity 5.0000

UOM EA

Start Price 169.00000

Weighting

Previous Line

Next Line

Item ID 0051404000

Item Description: ABRASIVES, PLASTONE ABRASIVES, PLASTONE

Bid Analysis and Display Options

Analysis

Bidder Name Commercial & Construction A Services Group LLC

In & Out Total Building Maintenance LL

Cleaning Inc

Event Version 5

5

5

Bid Number 1

1

1

Bid Quantity 5.0000

5.0000

5.0000

Minimum Bid Quantity 0.0000

0.0000

0.0000

Total Bid Amount 500.0000

500.0000

925.0000

Total Bid Cost 0.00

0.00

0.00

Total Line Score 100.0000

100.0000

0.0000

Bid Action

Reject Reason Code

Award by Percent

Award Quantity

Hide Bid ☐

☐

☐

Factors**Add/Edit Bid Factors**

Weighting UOM Ideal

What is your bid price?

Recalculate

Unhide Bids

<<

<

>

>>

Go To Line

OK

Cancel

Apply



Award and Post the Event: By Line (continued)

Repeat the award steps for each line. Once the event awards are complete for each line, click **Save**. Navigate to the **Award Details** page using the **Go To** drop-down box, select **Award Events**.

Favorites ▾Main Menu ▾> Sourcing ▾> Maintain Events ▾> Analyze Events

New Window

Analyze Line

Analyze Total

Analyze Line



Business Unit: 50100Event ID: 0000155594Round: 1Version: 3Event Name: Asphalt-Williamsburg Residency-Lee Hall Plant

Event Format: BuyEvent Type: RFxCurrency: USDEnd Date: 08/07/2019 2:15PM EDTStatus: Awarded

Go To:

- Award Events
- ...
- Analyze Export
- Associate Planning Task
- Award Events**
- Create New Round
- Document Status Inquiry
- Event Comments and Attachments
- Invite Collaborators
- Review Optimization

Line Items ?

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty				
1	7452123000	SM-9.5A (SURFACE MIXTURE) SM-9.5A (SURFACE MIXTURE)	 7452123	LTN	58.75000	300.0000				
2	7452123000	SM-9.5A (SURFACE MIXTURE) SM-9.5A (SURFACE MIXTURE)	 7452123	LTN	58.75000	300.0000	300.0000	0.00000	Closed ▾	Analyze

First ◀ 1-10 of 32 ▶ Last



Award and Post the Event: By Line (continued)

Make the award to the PO or contract using the **Award Type** drop-down box. Click on the right and left arrows to scroll through the **Award Details** to review and update the **Award Type** for each bidder. The **PO Business Unit** and payment **Terms** must also be updated. When complete, click **Post Award**.

Favorites ▾Main Menu ▾Sourcing ▾Maintain Events ▾Event Workbench ▾Analyze Events ▾Award Events

Award Details

Award Details

Award Summary

Review Constraints

Business Unit: 50100

Event ID: 0000153663

Event Format: Buy

Round: 1

Event Type: RFx

Currency: USD

Version: 6

End Date: 01/23/2017 1:08PM EST

Event Name: RFP Sample

Status: Pending Award

Go To: ▾

Show Award Details to Bidders

☐ Display bids

☐ Display all bids

☐ Display bid scores

☐ Display bid's total bid price

☐ Display factors

Award Details ?

First 1 of 3 Last

Bidder Name In & Out Total Building Maintenance LL

Bidder Type Supplier

Buyer GEORGE.MASON

Award Type Purchase Order ▾

Award Currency Event ▾ USD

Terms

PO Business Unit 50100

Award Number 1

Total Award 368.0000

Award Lines

Personalize | Find | View All | First 1 of 1 Last

Line	Item ID	SuppItem Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price
	3 0051404115	☑	ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT		RO	1.0000	368.0000	368.0000

Post Award

Save

Return to Search

Notify

Award Details | Award Summary | Review Constraints



Award and Post the Event: By Group (Lot)

If Lines are grouped on the event (Lot), they must be bid on and awarded by Lot. Awards by group/lot are done on the **Analyze Group** page.

Navigate to this page using the following path :

Main Menu > Sourcing > Maintain Events Analyze Events

- Search and select the event. The **Analyze Total** page will display.
- Click on the **Analyze Group** hyperlink.
- Click on the **Analyze** hyperlink next to each **Group ID/Lot** to be awarded. Another **Analyze Group** page will display and details the extended bid response.

Favorites ▾Main Menu ▾ > Sourcing ▾ > Maintain Events ▾ > Event Workbench > Analyze Events

Analyze Group

Analyze TotalAnalyze LineAnalyze Group

Business Unit:50100

Event ID:0000153665

Event Format:Buy

Round:1

Event Type:RFx

Currency:USD

Version:2

End Date:02/02/2017 1:31PM EST

Event Name:AWARD BY GROUP (LOT)

Status:Pending Award

Go To:

...

Line Items

Personalize | Find | View All |

First 1 of 1 Last

Line	Group ID	Description	Details	UOM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze
4	LOT 1	Richmond District	Details	10	0.03000	1.0000	1.0000	Open ▾	Analyze

Save

Return to Search

Analyze Total | Analyze Line | Analyze Group



Award and Post the Event: By Grand Total

Bids are considered and awarded based on the sum of all line items (grand total). Cardinal retains all bid/proposal responses, including those that do not result in an award.

Favorites ▾Main Menu ▾Sourcing ▾Maintain Events ▾Event Workbench ▾Analyze Events

Analyze Total

Analyze Total

Analyze Line

Analyze Group

Business Unit: 50100

Event ID: 0000153663

Round: 1

Version: 6

Event Name: RFP Sample

Event Format: Buy

Event Type: RFX

Currency: USD

End Date: 01/23/2017 1:08PM EST

Status: Pending Award

Go To: ▾

► Bid Analysis and Display Options (?)

Analysis

Bidder Name	In & Out Total Building Maintenance LL	Commercial & Construction Cleaning Inc	A Services Group LLC
Event Version Responded To	5	5	5
Bid Number	1	1	1
Total Bid Amount	1,583.00	1,285.00	1,200.00
Total Bid Cost	0.00	0.00	0.00
Total Event Score	0.00	0.00	0.00
Total Header Cost	0.00	0.00	0.00
Total Header Score	0.00	0.00	0.00

Bid Action ▾Award ▾

Reject Reason

Award by Percent

Hide Bid ☐

Award ▾

☐

Award ▾

☐

► Factors

Recalculate

Add / Edit Factors

Unhide Bids

<<

<

>

>>

Save

Return to Search

Analyze Total | Analyze Line | Analyze Group



Award and Post the Event: Post the Award

Once the award determination has been made, use the **Award Details** page to award the event.

Access the **Award Details** page from the **Analyze Total** or **Analyze Line** page using the drop-down **Go To:** menu and selecting **Award Events**.

Or navigate to the **Award Details** page using the following path:

Main Menu > Sourcing > Maintain Events > Award Events

Favorites ▾

Main Menu ▾ > Sourcing ▾ > Maintain Events ▾ > Event Workbench > Analyze Events

Analyze Total

Analyze Total

Analyze Line

Analyze Group

Business Unit:

Event ID:

Round:

Version:

Event Name:

50100

0000153663

1

6

RFP Sample

Event Format:

Event Type:

Currency:

End Date:

Status:

Buy

RFx

USD

01/23/2017 1:08PM EST

Pending Award

► Bid Analysis and Display Options ?

Analysis

Bidder Name	In & Out Total Building Maintenance LL	Commercial & Construction Cleaning Inc	A Services Gro
Event Version Responded To	5	5	5
Bid Number	1	1	1
Total Bid Amount	1,583.00	1,285.00	1,200.00

⌕

...Analyze Export

Associate Planning Task

Award Events

Create New Round

Document Status Inquiry

Event Comments and Attachments

Invite Collaborators

Review Optimization



Award and Post the Event: Post the Award (continued)

From the **Award Details** page, perform the following:

- Select the **Award Type** of **Purchase Order** or **PO Contract**.
- Ensure the **Supp/Item Rel** checkbox is checked. This will associate the item with the supplier for future use.
- Click **Post Award**.

eVA and agency procurement standards/requirements will apply.

Award Details

Award Details

Award Summary

Review Constraints

Business Unit: 50100

Event ID: 0000153663

Round: 1

Version: 6

Event Name: RFP Sample

Event Format: Buy

Event Type: RFx

Currency: USD

End Date: 01/23/2017 1:08PM EST

Status: Pending Award

Go To:

Show Award Details to Bidders

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details [?](#)

Bidder Name **In & Out Total Building Maintenance LL**

Award Type **Purchase Order**

Bidder Type **Supplier**

Award Currency **Event** **USD**

PO Business Unit **50100**

Buyer **GEORGE.MASON**

Terms

Award Number **1**

Total Award **368.0000**

Award Lines

Personalize | Find | View All | | |

First 1 of 1 Last

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
3	0051404115	<input checked="" type="checkbox"/>	ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT		RO	1.0000	368.0000	368.0000	<input type="text"/>	<input type="text"/>

Post Award

Save

Return to Search

Notify

[Award Details](#) | [Award Summary](#) | [Review Constraints](#)



Create a Purchase Order/Contract: Award to Purchase Order

If the event is for a one time or spot purchase, the event is generally awarded to a PO. The **PO Business Unit**, **Line(s)**, and schedule information usually default from the sourcing event. Confirm accuracy of the information.

Select the **Award Type** value of **Purchase Order**.

For more detailed information about awarding to a purchase order, see the course entitled **501 PR344: Processing Purchase Orders** located on the Cardinal website in **Course Materials** under **Training**.

Award Details

[Award Details](#) [Award Summary](#) [Review Constraints](#)

Business Unit: 50100

Event ID: 0000153663

Round: 1

Version: 6

Event Name: RFP Sample

Event Format: Buy

Event Type: RFx

Currency: USD

End Date: 01/23/2017 1:08PM EST

Status: Pending Award

Go To:

Show Award Details to Bidders

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details ?

Bidder Name **In & Out Total Building Maintenance LL**

Award Type **Purchase Order**

Bidder Type **Supplier**

Award Currency **Event** USD

PO Business Unit **50100**

Buyer **GEORGE.MASON**

Terms

Award Number **1**

Total Award **368.0000**

Award Lines [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [First](#) | [1 of 1](#) | [Last](#)

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
	3 0051404115	<input checked="" type="checkbox"/>	ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT		RO	1.0000	368.0000	368.0000		

Post Award

[Save](#) [Return to Search](#) [Notify](#)

[Award Details](#) | [Award Summary](#) | [Review Constraints](#)



Create a Purchase Order/Contract: Award to Purchase Order (continued)

Award Details

[Award Details](#)[Award Summary](#)[Review Constraints](#)

Business Unit: 50100

Event ID: 0000153663

Event Format: Buy

Round: 1

Event Type: RFx

Currency: USD

Version: 6

End Date: 01/23/2017 1:08PM EST

Status: Pending Award

Event Name: RFP Sample

Go To:

...

▼ Show Award Details to Bidders

☐ Display bids

☐ Display all bids

☐ Display bid scores

☐ Display bid's total bid price

☐ Display factors

Award Details ?

Bidder Name **In & Out Total Building Maintenance LL**

Award Type

Purchase Order

Bidder Type **Supplier**

Award Currency

Event

 USD

PO Business Unit

50100

Buyer

GEORGE.MASON

Terms

Award Number 1

Total Award 368.0000

Award Lines

Personalize | Find | View All |

First 1 of 1 Last

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
	3 0051404115	<input checked="" type="checkbox"/>	ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT		RO	1.0000	368.0000	368.0000	<div></div>	<div></div>

Post Award

Save

Return to Search

Notify

[Award Details](#) | [Award Summary](#) | [Review Constraints](#)

75



Create a Purchase Order/Contract: Award to Purchase Order (continued)

Once **Purchase Order** is selected as the **Award Type** and click **Post Award**, the **Express Purchase Order** page displays.

The **Express Purchase Order** page is similar to the regular **Purchase Order** page.

When reviewing the page, take note of these items in particular:

- The **PO Status** of the PO is **Open** upon award and will change to **Approved** when the check mark is clicked.
- Use the **PO Defaults** hyperlink to modify or add the accounting distributions.
- Additional hyperlinks are also available and provide more details.
- Clicking the arrow to the left of the line to review the schedule details for a line.

Once updated, the PO is complete and dispatched by the Buyer.

Express Purchase Order
Purchase Order

Business Unit: 50100
PO ID: 0001143536
Copy From: [dropdown]
☐ Hold From Further Processing

Header
*PO Date: 08/08/2016
*Supplier: ENVIRONMEN-039
*Supplier ID: 0000030959
*Buyer: DIANE POWERS
PO Reference: Claypool Hill HQ/Pounding Mill
Web IMS?: ☐

Supplier Search
Supplier Details
ENVIRONMENTAL OPTIONS INC
Powers, Diane (VDOT)

Backorder Status: Not Backordered
Receipt Status: Received
*Dispatch Method: Print
eVA PO Type: R01
eVA Order Method: URL
eVA Interfaced: SEVA
eVA Dttm: 08/09/16 2:00:53PM

Amount Summary
Merchandise: 545.00
Freight/Tax/Misc.: 0.00
Total Amount: 545.00 USD

Add Items From
Catalog
Purchasing Kit

Select Lines To Display
Search for Lines
Line: [input] To: [input] Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1	9264538000	DISPOSAL OF HAZARDOUS MATERIAL PER VANDOT 137 characters remaining	1.0000	HUR	9264538	545.00	Approved

Expand All Collapse All View Approvals Go to ... More ...



Create a Purchase Order/Contract: Award to Purchase Order (continued)

Favorites ▾ **Main Menu** ▾ > **Purchasing** ▾ > **Purchase Orders** ▾ > **Add/Update Express POs**

Express Purchase Order
Purchase Order

Business Unit 50100
PO ID 0001143536
Copy From ▾ ☐ Hold From Further Processing

Header ?

*PO Date 08/08/2016 [st] Supplier Search
*Supplier ENVIRONMEN-039 Supplier Details
*Supplier ID 0000030959 ENVIRONMENTAL OPTIONS INC
*Buyer DIANE.POWERS Powers, Diane (VDOT)
PO Reference Claypool Hill HQ/Pounding Mill
Web IMS?: ☐

Backorder Status Not Backordered Create BackOrder
Receipt Status Received
*Dispatch Method Print Dispatch
eVA PO Type R01 Routine Bill Vendor
eVA Order Method URL
eVA Interfaced SEVA
eVA Dttm 08/09/16 2:00:53PM

Amount Summary ?

Merchandise	545.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	545.00 USD	

Add Items From ?

Catalog Item Search
Purchasing Kit

Select Lines To Display ?

Search for Lines
Line To Retrieve

Lines ?

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1	9264538000	DISPOSAL OF HAZARDOUS MATERIAL PER VADOT 137 characters remaining	1.0000	HUR	9264538	545.00	Approved

Expand All Collapse All View Approvals

Go to ... More ... ▾



Create a Purchase Order/Contract: Award to Contract

When an event is to be awarded to a contract, select the **Award Type** value of **PO Contract**.

For more detailed information about awarding and setting up contracts, see the course entitled **501 PR348: Entering Procurement Contracts** located on the Cardinal website in **Course Materials** under **Training**.

Award Details

[Award Details](#)[Award Summary](#)[Review Constraints](#)

Business Unit: 50100

Event ID: 0000150757

Event Format: Buy

Round: 1

Event Type: RFx

Currency: USD

Version: 2

End Date: 01/10/2013 2:40PM EST

Status: Awarded

Event Name: FOB Stone for Wise Residency

Go To:

...

▼ Show Award Details to Bidders

☐ Display bids

☐ Display all bids

☐ Display bid scores

☐ Display bid's total bid price

☐ Display factors

Award Details ?

First 1 of 1 Last

Bidder Name **Jessee Stone Co**

Bidder Type **Supplier**

Buyer **CAROLYN.WISDOM**

Award Type **Procurement Contract**

Award Currency **Event** **USD**

Terms **30**

*Contract Style **Purchase Order**

PO Business Unit 50100

Contract ID **000000000000000000041260**

Total Award **253,970.0000**

Award Number **1**

Award Lines

[Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Refresh](#)

First 1-10 of 12 Last

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
1	7503548480	<input checked="" type="checkbox"/>	STONE, CRUSHED GRADE 25		LTN	10,000.0000	9.4000	94,000.0000		
2	7503532045	<input checked="" type="checkbox"/>	STONE NO. 8, STONE		LTN	2,500.0000	8.4000	21,000.0000		
3	7503532020	<input checked="" type="checkbox"/>	STONE NO. 1, STONE		LTN	3,500.0000	9.4000	32,900.0000		
4	7503548440	<input checked="" type="checkbox"/>	STONE, CRUSHED GRADE 9 CRUSHED STONE		LTN	1,000.0000	9.9000	9,900.0000		



Create a Purchase Order/Contract: Award to Contract (continued)

Award Details

Award Details

Award Summary

Review Constraints

Business Unit:
50100

Event ID:
0000150757

Round:
1

Version:
2

Event Name:
FOB Stone for Wise Residency

Event Format:
Buy

Event Type:
RFx

Currency:
USD

End Date:
01/10/2013 2:40PM EST

Status:
Awarded

Go To:
...

Show Award Details to Bidders

☐ Display bids

☐ Display all bids

☐ Display bid scores

☐ Display bid's total bid price

☐ Display factors

Award Details ? First 1 of 1 Last

Bidder Name Jessee Stone Co

Bidder Type Supplier

Buyer CAROLYN.WISDOM

Award Type Procurement Contract

Award Currency Event USD

Terms 30

***Contract Style** Purchase Order

PO Business Unit 50100

Contract ID 0000000000000000000041260

Award Number 1

Total Award 253,970.0000

Award Lines Personalize | Find | View All | First 1-10 of 12 Last



Cancel a Purchase Order/Contract Associated to an Event

After awarding an event to a PO or a contract, Cardinal retains links to the PO and contract.

If the PO or contract are attached to an event, a cancellation will trigger Cardinal to ask if the quantity is to be returned back into the Strategic Sourcing event again.

This happens when:

- The PO or contract is cancelled
- A PO or contract line is cancelled
- A PO schedule is cancelled
- Quantities associated with a line or schedule are reduced

If the response is yes, Cardinal puts the quantity back to the award, and the quantity either can be re-awarded to another Bidder/Offeror or manually closed it on the **Award Summary** page by setting the **Line Status** field to **Closed**.



Lesson 4: Summary

4

Analyze Bids/Proposals and Awarding Events

In this course, you learned:

- The **Analyze Total** page on the **Event Workbench** allows you to review bid/proposal responses.
- You have the option to invite others to collaborate on the bid/proposal responses.
- You can award by line, group, or grand total.
- After you have analyzed the bids/proposals responses and made your selection, you can award the winning bid/proposal to a PO or PO Contract



Lesson 5: Strategic Sourcing Hands-On Practice

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Course Summary

PR345

Strategic Sourcing

In this course, you learned:

- Recognize key strategic sourcing concepts
- Create, modify, and manage Strategic Sourcing events in Cardinal
- Analyze bids/proposals
- Award events
- Understand how Strategic Sourcing integrates with other Cardinal modules and interfaces with external systems
- Understand how strategic sourcing interfaces with external systems



Course Evaluation

Congratulations! You successfully completed the **501 PR345: Strategic Sourcing** course.

Your instructor will provide instructions on how to access the evaluation survey for this course.





Appendix

- Key Terms
- Allowed Extensions on Attachments in Cardinal
- Event Status
- Diagrams and Screenshots
- Flowchart Key



Key Terms

- **Award:** An award is made to the winning Bidder/Offeror by a purchase order (PO) or a contract.
- **Bidder/Offeror:** The Bidder/Offeror is anyone who submits a bid/proposal on an event.
- **Bidder /Offeror Response:** A Bidder/Offeror Response is the response by a Bidder/Offeror to an event.
- **Bid Factor:** A bid factor is a weighted question about the Bidder's/Offeror's products, services, or company and may require a response by the Bidder/Offeror. Header bid factors relate to the overall event, whereas line bid factors relate only to the specific line.
- **Bids/Proposals:** Bids/proposals are submissions of an offer on an event.
- **Buy Event:** A Buy Event is the purchase of goods and/or services associated with a request for a price quote or proposal.
- **Event Format:** The event format is either Buy or Request For Information (RFI).
- **Event Types:** An event type may be an Invitation For Bid (IFB), Request For Proposal (RFP), or Request For Information (RFI).



Key Terms (continued)

- **IFB:** An Invitation For Bid (IFB) (competitive bidding) event type is the method by which bids for a specified good or service are solicited from Bidders/Offerors.
- **RFI:** A Request for Information (RFI) is a sourcing event type by which information about a good or service is solicited from Bidders/Offerors. It is more of an open inquiry seeking broad data and understanding.
- **RFP:** A Request For Proposal (RFP) (competitive negotiation) event type is the method by which proposals for a good or service are solicited from Bidders/Offerors.
- **RFx:** RFx is a catch-all term for event types such as Invitation For Bid (IFB), Request For Proposal (RFP), or Two-Step Bid.
- **Solicitation Type:** The Solicitation Type is the classification of an event, which defines the means of procurement. Values include Emergency, IFB Sealed, IFB Unsealed, Prof Services, Request for Response, Standard Contract, Small Purchase, Sole Source, Step Bidding, and Unsealed Contract.
- **Strategic Sourcing Event:** A Strategic Event is the process of soliciting quotes, bids/proposals, and/or offers to establish contracts and/or purchase orders.
- **Two-Step Bid:** A Two-Step Bid (competitive bidding) event type is the method by which an existing supplier is asked to provide a bid for a continued good or service based on an existing contract.



Allowed Extensions on Attachments in Cardinal

The following is a list of file extensions that are allowed on attachments uploaded to Cardinal. You should only attach key supporting documents that either enhance the electronic Cardinal transaction approval process or are instrumental as part of the transaction history. The Cardinal system should not be relied upon to maintain agency documentation and should not be considered the official retention source of the agency. Supporting documents, as required by all applicable regulatory/governing bodies, should be maintained by the agency apart from the Cardinal attachment functionality.

Allowed Extensions on Attachments in Cardinal		
.BMP	.CSV	.DOC
.DOCX	.JPE	.JPEG
.JPG	.MSG	.PDF
.PNG	.PST	.RTF
.TIF	.TIFF	.TXT
.XLS	.XLSX	.XML



Event Statuses

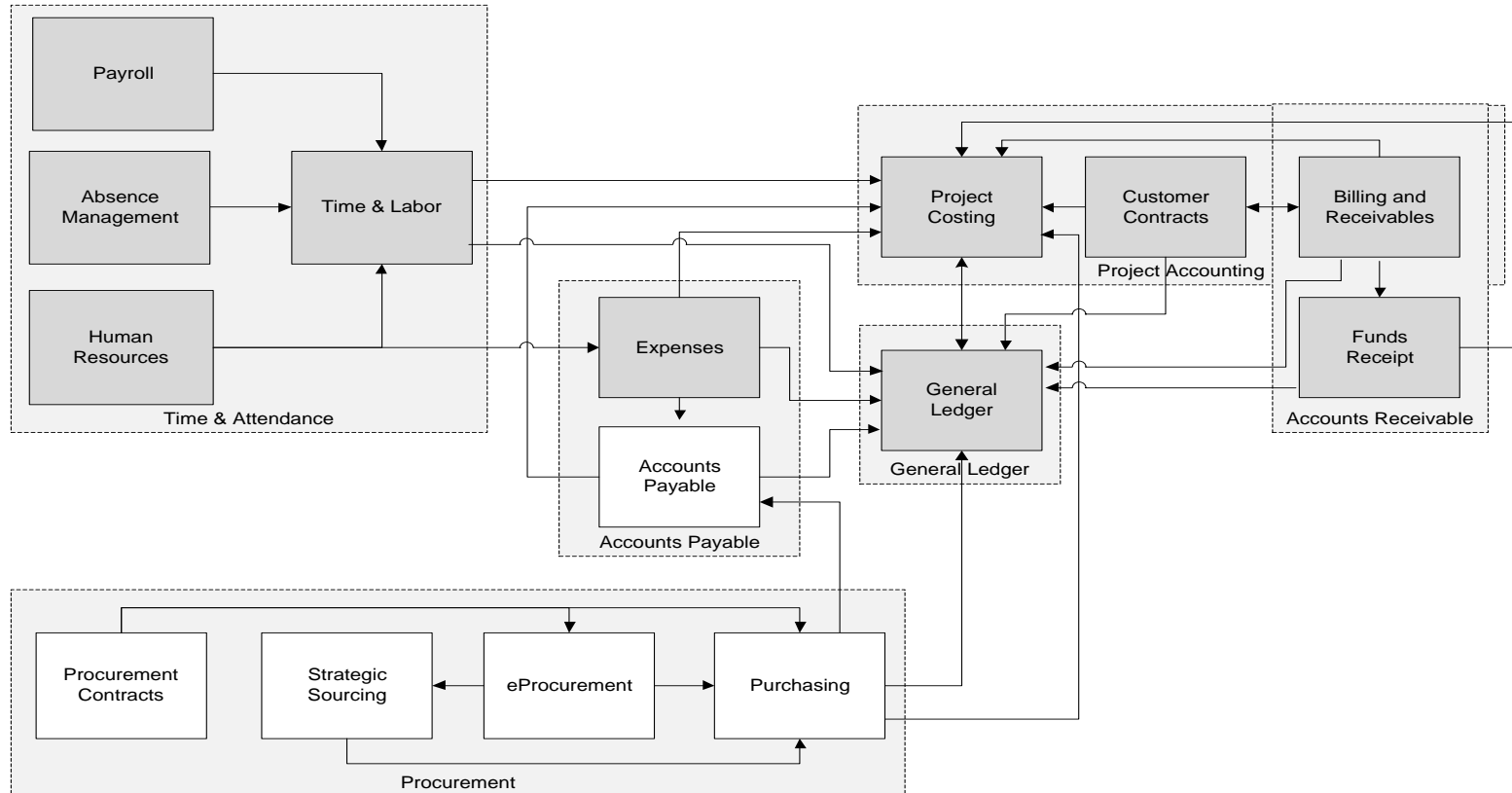
Status	Description	Bids Allowed
Open	Saved event, not posted, not routed for collaboration	No
Posted	Event is ready for bidding	Yes
Collaborating Event	Event routed for internal collaboration	No
Event Complete	Event ended but update event status process has not run	Yes
Pending Award	Event is complete, update event status process has run, has not been awarded	No
Collaborating Bid Analysis	Event has routed for bid analysis collaboration	No
Awarded	Event award has been approved, event is complete	No
Not Awarded	Event ended without being awarded	No
Cancelled	Event was cancelled, no award	No



Integration with Procurement and Accounts Payable

Strategic Sourcing integrates with other Cardinal modules in the following way:

- After an event is awarded, either a PO or contract is issued. These items integrate with future requisitions, POs, contracts, and PCards.

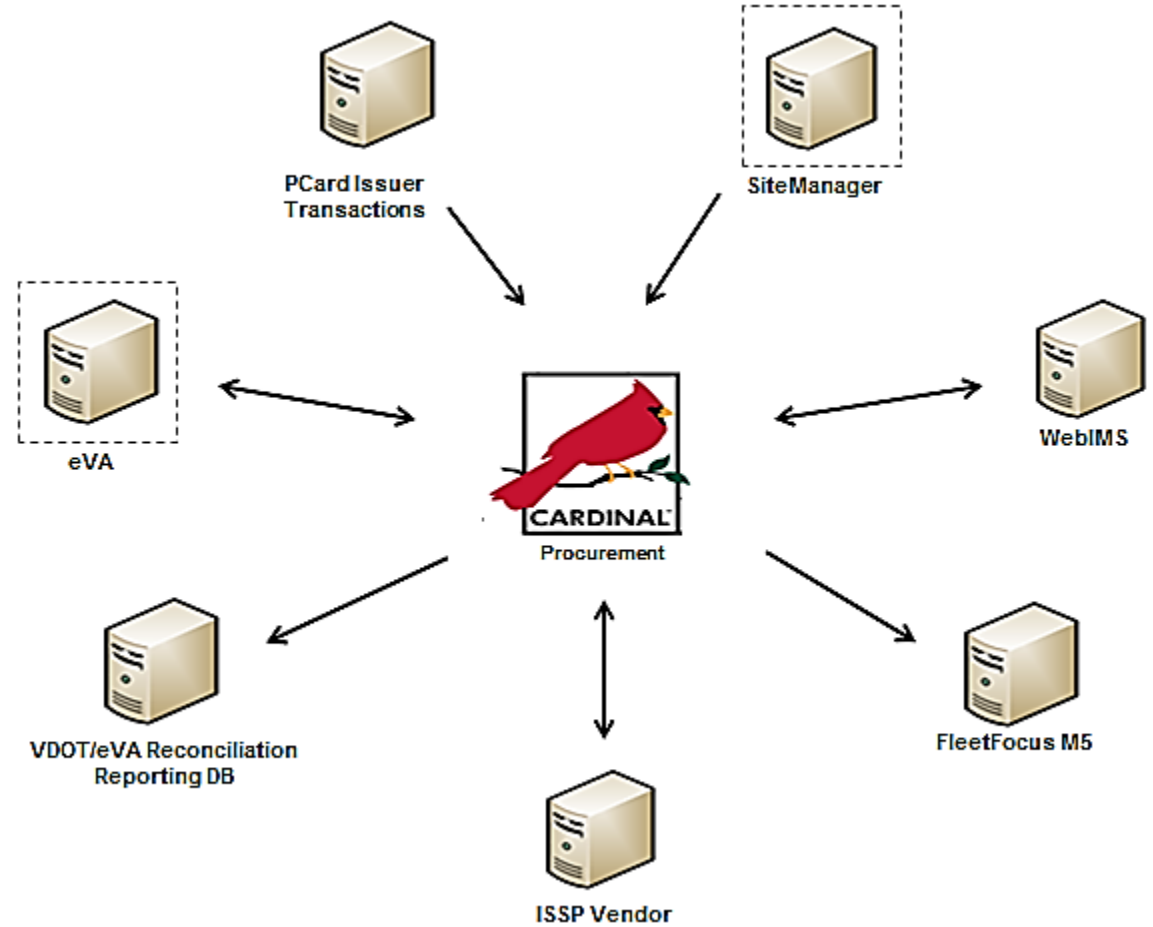




Interface with eVA



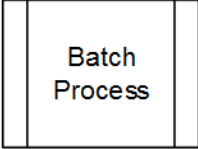
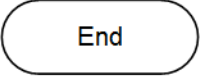
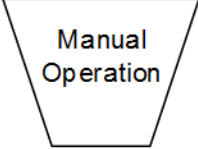
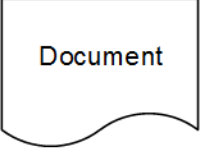
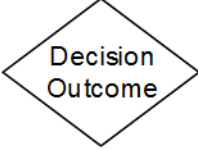
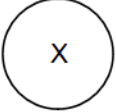
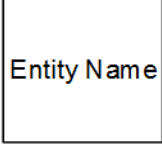
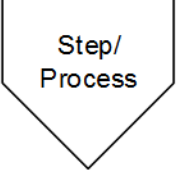
The Strategic Sourcing module also interfaces with an external system.

- Strategic Sourcing events are manually posted to
- All bidders must be registered in eVA.
- All eVA bidders (vendors) are interfaced into Card





Flowchart Key

	Depicts a process step or interface.		Indicates point at which the process begins. Does not represent any activity.
	Specifies a batch process.		Indicates point at which the process ends. Does not represent any activity.
	Depicts a process step that is preformed manually.		Depicts a document of any kind, either electronic or hard copy.
	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.		Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
	Represents an entity (person, organization, etc.).		Connects steps between business processes.